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VEGETABLE Situation



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THE VEGETABLE SITUATION

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Approved by
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and Summary released
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Principal contributors
Charles W. Porter
Joseph C. Podany

Commodity Economics Division

Economic Research Service

U.S. Department of Agriculture
Washington, D.C. 20250

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SUMMARY

Weather Reduced Supplies Push Fresh Vegetable Prices to New Highs

Even before the Florida freeze, smaller supplies of *fresh vegetables* were expected this winter. As a result, the index of prices received by growers of *fresh vegetables* moved up nearly 30 percent between December and January, largely due to sharply advancing prices for onions, reduced supplies of cabbage and carrots in Texas, and a temporary jump in western lettuces prices.

A further price advance, between January and February, is expected since the bulk of fresh market supplies of tomatoes, cucumbers, and eggplant now will be coming from Mexico. In addition, supplies of Florida's hardier vegetables will be temporarily lighter due to delayed harvests and possibly lower yields of marketable grades of celery, cabbage, and corn. Grower prices for fresh vegetables likely will remain high until April when spring harvest of tender Florida vegetables begins.

Grower prices for commercial fresh market vegetables (excluding potatoes) in the first quarter are expected to average around 30 percent above the closing months of 1976 and nearly a fifth above a year earlier. Although potato prices in the first quarter are up moderately from the closing months of 1976, in part a seasonal rise, they will likely average more than a fourth below a year earlier. Higher grower prices will mean higher retail prices for fresh vegetables. First quarter retail prices for the fresh vegetable component of the food price index (which includes potatoes) will likely average a fifth higher than in the closing months of last year and the first quarter of 1976. This rise alone will likely account for an increase of about 1 percent in grocery store prices for food.

Normal supplies of lettuce, celery, and broccoli are expected from California during the winter quarter. Since the spring crop of onions in Texas will be much smaller and later than usual, the remaining supplies of storage onions from northern States may not be sufficiently large to forestall further price rises in February and March.

There is renewed concern at this time for fresh and processed vegetable crops to be planted in the Central Valley of California and other Western

vegetable producing regions now under severe water use restrictions. The threat of acreage reduction for some vegetable crops this summer cannot be discounted at this time.

The price outlook for *processed vegetables* during the first half of 1977 suggests firm to moderately higher prices for most items, as supplies are substantially smaller than the burdensome quantities on hand a year earlier. Supplies of canned tomatoes, concentrated tomato products, canned snap beans, and most leading frozen vegetables have now worked out of their heavy stocks positions, though supplies of canned corn, canned peas, and frozen corn are still very large. Florida's adverse weather affected salad vegetables the most, and would suggest some transfer of demand from fresh vegetables to processed forms during February and March.

With Maine and other *potato* States east of the Rockies providing most of the fresh market export activity, grower prices in these sections of the U.S. have improved substantially in recent weeks. In fact, brisk export movement has averted what would otherwise have proven a market disaster for

potato growers east of the Rockies. Nevertheless, potato prices are still below a year earlier, because record-large stocks exist in the Pacific Northwest. Even though this region is least favorably situated geographically to supply table stock to Europe, processors there are shipping abroad record quantities of flakes, granules, and frozen fries.

Recently, grower prices in Idaho have shown slight improvement, and fresh market prices now seem on a somewhat firmer basis.

Dry bean prices continue in the doldrums due to the lack of an export business and the sluggish movement of major bean classes in domestic channels. Exports of dry beans between September and January 1 amounted to 1.4 million cwt., substantially more than a year earlier, but sharply less than 2 seasons ago. Some of the smaller tonnage classes—limas, garbanzos, and blackeye peas—have been selling better in the domestic market. The January average price for all classes was \$14.10 per cwt., compared with \$20.00 a year earlier. Domestic sales of pintos and pea beans have been slack thus far this year, but the recent record breaking cold weather may stimulate sales.

RECENT DEVELOPMENTS AND OUTLOOK

FRESH VEGETABLES

Serious Crop Damage This Winter

Three consecutive nights of low temperatures brought chaos to the winter vegetable price and supply situation. Florida's killing freeze the week of January 16 was enough to devastate fields of tender vegetables and to check growth and development of other more hardy crops.

Even before this damage occurred, domestic fresh vegetable supplies were expected to be smaller since acreage for the winter quarter had been estimated 5 percent smaller than a year earlier. This cut was largely the result of sharply reduced cabbage and carrot acreage in Texas. Under more normal conditions 5 percent less winter vegetable tonnage might have been expected, but with cold, wet weather in Texas added to the Florida disaster, winter harvest volume will fall sharply below that figure. For the past 3 years, winter vegetable output has accounted for 17 percent of annual production volume.

Florida's freeze damage severely damaged winter crops of tomatoes, peppers, snap beans, cucumbers, and eggplant. Therefore, market supplies of these crops during February and March will originate mostly in western Mexico, and will be distributed through Nogales, Arizona. Normally, Mexico

provides half the tomatoes and peppers, and more than half the cucumbers, consumed in the winter quarter. Supplies of fresh snap beans will virtually disappear in February and much of March. However, by early April, Florida will again be shipping these tender vegetables, if no further weather damage occurs.

The hardier vegetables in south Florida—cabbage, celery, lettuce, escarole, radishes, and sweet corn—fared better, and were not destroyed, though some acreage of sweet corn in the more vulnerable development stages was lost. Nonetheless, normal growth and development were hampered, and some loss of market quality has resulted. Normal supplies of lettuce, celery, and broccoli are expected from California during the rest of the winter quarter. Since the spring crop in Texas will be smaller and will mature later this year, remaining supplies of storage onions from Northern States may not be sufficiently large to forestall further price rises in February and March.

Fresh Vegetable Prices to Hit New Record Highs

The index of prices received by growers for fresh vegetables moved up 50 points, nearly 30 percent, between December 15 and January 15, going from 172 to 222 (1967=100). Annual averages in 1975 and

1976 were 173 and 172. A further rise in February may be expected. Barring further weather problems, sometime around April 1, vegetable prices received by growers will fall sharply when spring harvest activity begins.

The Weather Factor

The impact of the weather disaster was serious enough for southern counties of Florida to be declared a disaster area by Federal authorities. This meant that migrant workers left with no crops to harvest could collect unemployment benefits from a special fund. They could more easily obtain food stamps as well. At the same time, producers are eligible for loans at low rates of interest, but only after conventional credit sources are exhausted. Some vegetable replanting in the Immokalee area is taking place, but Dade County is largely finished until the next sequence of harvests.

While the impact of the Florida weather damage will probably be behind us by April, a potentially more serious threat to U.S. food supplies is posed by the irrigation water shortage in the West, particularly California. With reservoir capacities only a fourth of normal in some areas, growers are now being told to expect to absorb proportional cuts in water deliveries. This means that growers are now facing the difficult decisions on how much of each crop they can plant, and which fields must be held fallow. For the time being, presumably the crops which provide the highest net return per acre would be the ones given the highest priority for limited supplies of water. With most growers, fresh and processed vegetable acreage would probably receive a higher priority than field crops. However, growers who plant under contract, as with cannery tomatoes, would probably seek higher prices to cover their sharply increased unit fixed costs.

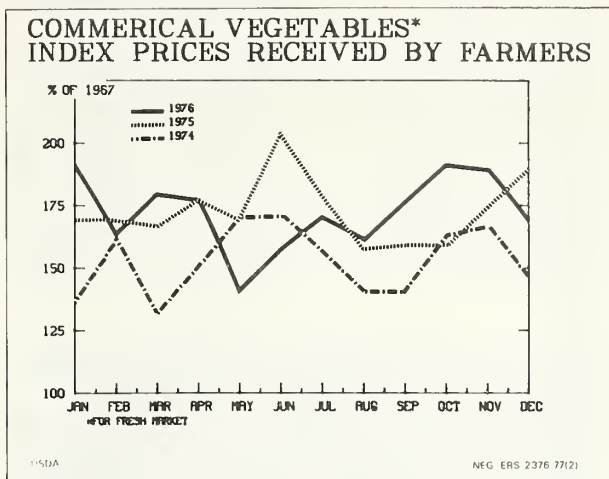
Southern California water supplies are not severely affected at this time.

These Pacific and Mountain States which face short water supplies account for 55 percent of our domestic fresh vegetable production, and 60 percent of our processed tonnage. Therefore, any cut in vegetable acreage would be quickly reflected through the marketing system, and the economic effect of a 1977 water shortage would last until 1978 processing crops were harvested.

Fruit Fly Found in Mexico

The Mediterranean fruit fly recently has been found in Chiapas State, Mexico, not far from the Guatemalan border. Should an infestation reach the export vegetable shipping areas of Sinaloa or any other area which ships to the United States, U.S. quarantine officials would act to ban ship-

ments of certain crops like citrus, tomatoes, and melons which harbor the pest. This situation is being closely monitored by the United States and Mexico, and there appears to be no immediate threat to supplies of produce to the United States.

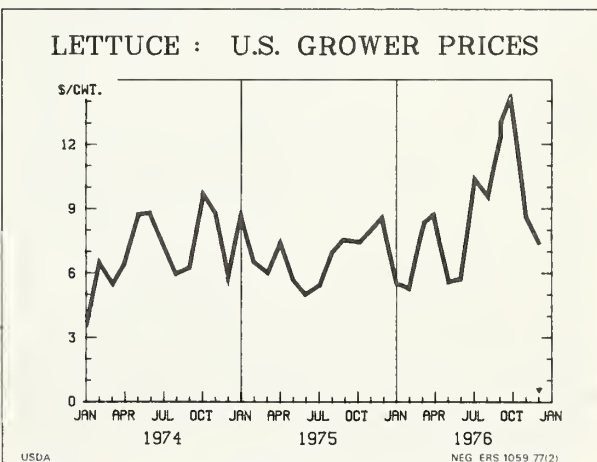


Prospects for Leading Items

Lettuce

The 1977 winter lettuce acreage is only slightly larger than a year earlier. With average yields production would be about the same as the 1976 winter crop, which was on the generous side.

The freezing weather in Florida did not wipe out the winter lettuce crop there, although some deterioration in quality occurred. Cool and wet weather in Texas has delayed harvesting and shipment from that State. Although early January shipments were interrupted by untimely rains, the

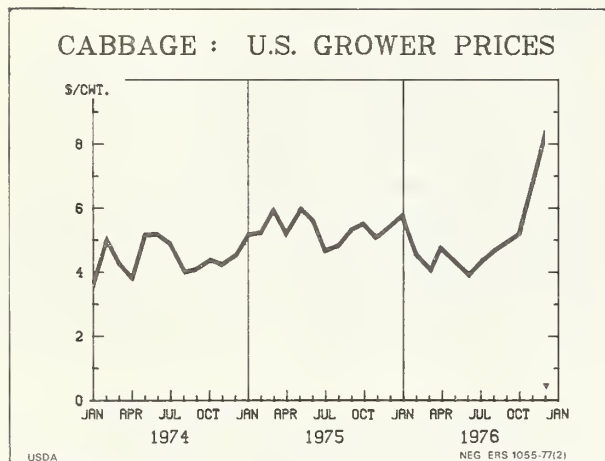


Imperial Valley of California which accounts for two-thirds of U.S. winter production will continue as the major source of supply through the winter quarter.

Cabbage

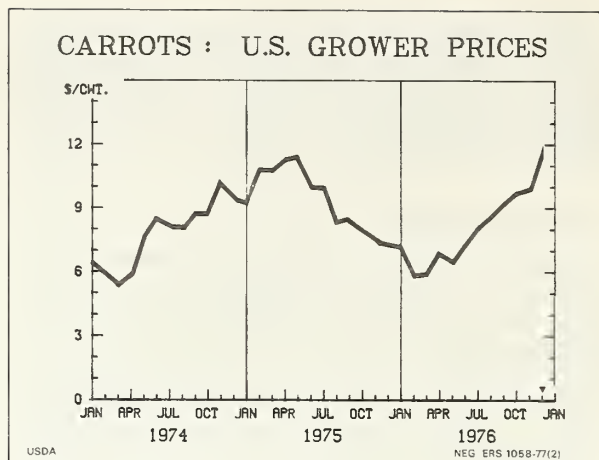
Due to heavy rains in Texas during the planting season, prospective cabbage acreage this winter is 30 percent less than last year. Historic average yields would result in supplies 28 percent below a year earlier. Cool damp conditions during the Texas growing season also delayed growth and development. The January freeze in Florida did some light damage to cabbage in the Hastings area, and some deterioration in quality may be expected. The New York stocks of stored cabbage at 570,000 cwt. were nearly 30 percent smaller this year.

With supplies greatly reduced this winter, grower prices as of mid-January were more than double those of a year ago in all producing regions. With lower Texas acreage and the effects of the Florida freeze, prices are holding the highest in history. A 1¼ bushel crate in mid-January was bringing \$5.88-\$8.75 compared with \$3.33 to \$3.58 a year earlier.



Carrots

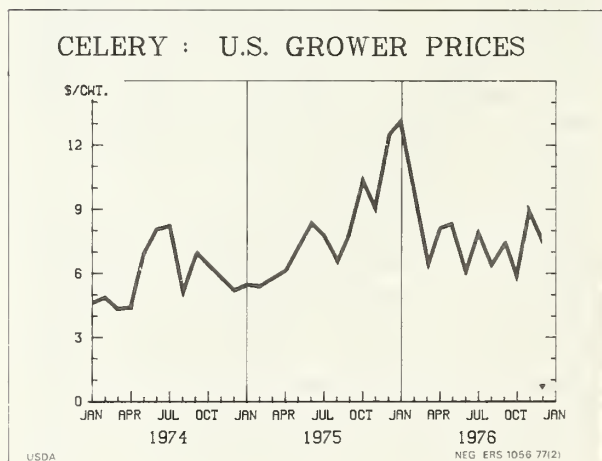
There is 25 percent less carrot acreage available for harvest in the winter quarter this year. Texas growers were not able to complete their planting plans due to the wet conditions prevailing in the Rio Grande Valley last fall. Assuming historic yields, supplies of carrots are likely to be 23 percent smaller than in 1976. Acreage in California is smaller too. As a result, prices per container of 48 1-pound film bags of Texas carrots during January were nearly 3 times as great as those a year earlier—\$8.25-\$9.00 vs. \$3.85.



Celery

Celery acreage for harvest during the winter quarter is 6 percent larger than a year earlier. With historic yields, a 4 percent greater production could be expected in 1977. There was some damage to outer leaves of the celery crop in Florida during the January freeze. The Florida freeze interrupted harvest activity temporarily. Although rains interfered with shipping schedules in January, harvest in the California areas is active.

Prices in mid-January, at \$7.15 per crate of 2-3 dozen stalks, were about \$1.00 below those of a year ago. With other salad vegetables in short supply, prices are expected to show substantial strength through February and March.



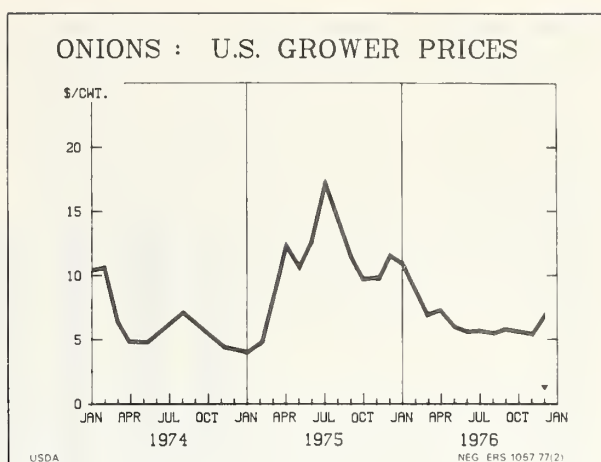
Tomatoes

Before the January freeze, prospective tomato acreage for harvest was nearly 4 percent larger than a year earlier. Based on historic yields, production was expected to be 9 percent more than the

1976 crop. However, the Florida winter tomato crop was largely destroyed during the week of January 16, and only a fraction of the 13,600 acres for harvest has marketable fruit remaining. Thus, roughly 40 percent of the February and March tomato supply is lost. The primary source of supply is Mexico for the balance of the winter quarter.

As of late January, crossings of Mexican tomatoes at Nogales, Arizona have been running about even with 1 year ago. Shipping volume will build up further as the season progresses, but little more than a typical crop is expected. A Mexican trade source estimates that 15,074 acres were to be planted in the Culiacan District (Sinaloa) compared with 14,838 acres a year earlier, but political disturbances may have interfered with this objective. Peak shipping will likely occur between mid-February and mid-April.

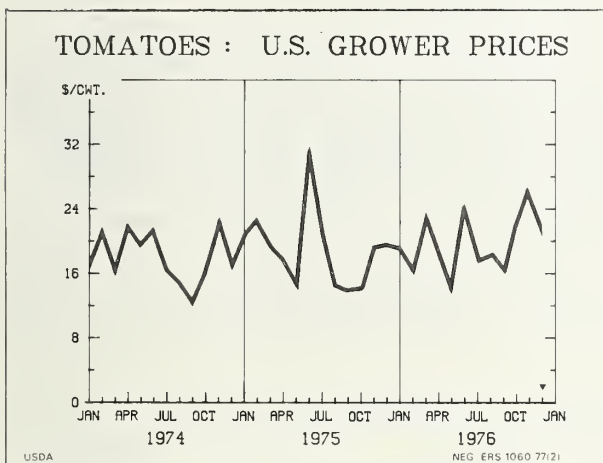
Tomato prices in the first half of January (just prior to the Florida freeze) were higher than a year earlier. Extra-large sized Florida greens were 31 cents per pound versus 24 cents a year earlier. Extra-large size Mexican breakers and ripers were 34 cents per pound versus 32 cents a pound a year earlier. Immediately after the Florida freeze f.o.b. prices on Mexican tomatoes at Nogales were quoted at 50-55 cents per pound.



were able to put in only about 80 percent of their intended acreage. In addition, the Texas crop developed slowly during much of the winter due to continued cool, wet conditions and tighter onion supplies are in prospect for the next two or 3 months. Average midmonth prices for all sales received by growers in 1976 ranged from a high of \$11.00 per cwt. in January to a low of \$5.33 per cwt. in June. By mid-January 1977 prices had risen to \$9.42. These price gains may be expected to hold, and further price rises should not be ruled out of the question.

With shorter supplies of onions expected here by March, import inquiries are being made. An attache report noted that New Zealand, with a 14 percent larger crop than last year, is expected to supply a moderate amount to the United States. Most of the exports from New Zealand's larger crop probably will be headed for European and Japanese destinations. The attache from Chile reports that their 1976/77 onion crop, at 175,000 metric tons, is up 40 percent over a year earlier. European, U.S., and Canadian buyers are showing interest in supplies from that country.

Later this spring, additional supplies will be coming from California and Arizona. Combined acreage in these two States is 11 percent smaller than a year earlier when unusually large plantings were made, and would suggest continued high onion prices for nearly all the first half of the year.



Onions

The 1976 production of storage crop onions excluding California was about the same as in 1975. However, onion stocks held in common and cold storage as of January 1, 1977, at 4.7 million cwt., were nearly 5 percent higher than a year earlier. The early spring Texas harvest will be delayed by about 3 weeks this year and acreage there is down by 32 percent from 1976. Wet weather during their planting season hampered seeding operations and necessitated some replanting. In fact, growers

PROCESSED VEGETABLES

The combined pack of canned and frozen vegetables in 1976 was substantially smaller than the year-earlier record. The large carryover of canned vegetables, added to 1976/77 packs, suggests that total supplies of processed vegetables in the current

market season are ample though less burdensome than was the case a year earlier.

Considering canned vegetables by themselves, the 1976 pack of 10 items (including canned tomatoes and tomato juice, but excluding concentrated tomato products) was nearly one-eighth smaller. Although deep cuts were apparently made in concentrated tomato products, the carryover of the 10 measured items was about 45 percent larger, and these elements combined to result in supplies roughly 4 percent less than last season's abundance.

In general, prices are higher than a year earlier, reflecting a better rate of movement and the knowledge that available supplies are smaller than the burdensome quantities on hand last year. An ERS wholesale price index of canned vegetables showed February prices 7 percent higher than a year earlier and 163 percent of the 1967 base. This figure was still slightly below the all-time high recorded 2 years ago this past January.

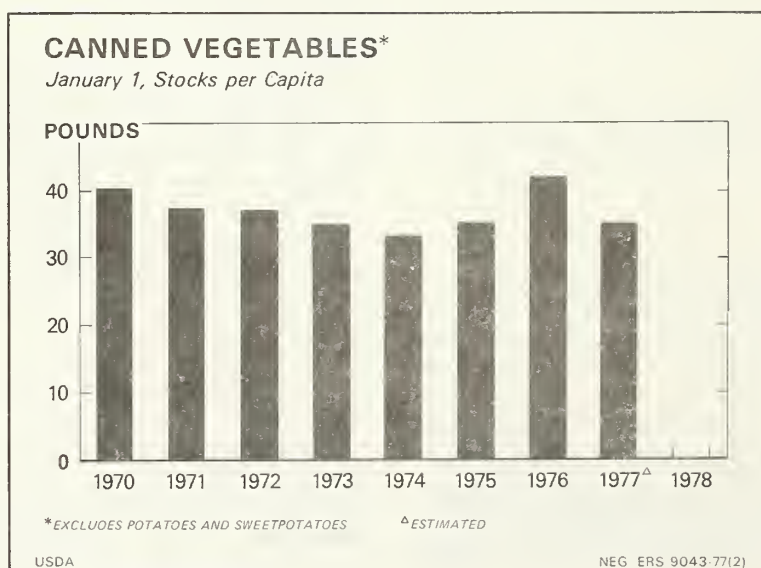
Compared with a year earlier, 1976/77 supplies of canned corn, peas, pickles, and sauerkraut were either larger or just barely less for the same period. In general, supplies of all tomato products are smaller this year, and among the other major items, canned snap bean stocks are best described as barely adequate for expected use. The carryover next summer is expected to be a small one.

Frozen vegetable packs in 1976 were substantially smaller as well. Along with slightly smaller carryover, the total supply of frozen vegetables available for the 1976/77 market season was enough less to remove downward price pressures, but yet be adequate for expected demand.

The price outlook for processed vegetables the first half of 1977 suggests firm to moderately higher prices for most items. The fact that adverse weather thus far this season has been affecting salad vegetables more than cooking vegetables, suggests some transfer in demand from fresh to processed. However, there are a few items such as fresh snap beans, squash, and eggplant—that were almost totally destroyed, and no domestic supplies of any consequence are expected to be available before March 15. At the very least, the weather will prove a psychological prop for processed vegetable prices between now and mid-spring. Canned and frozen peas and sweet corn are in heaviest supply with quantities large enough to absorb some additional buying.

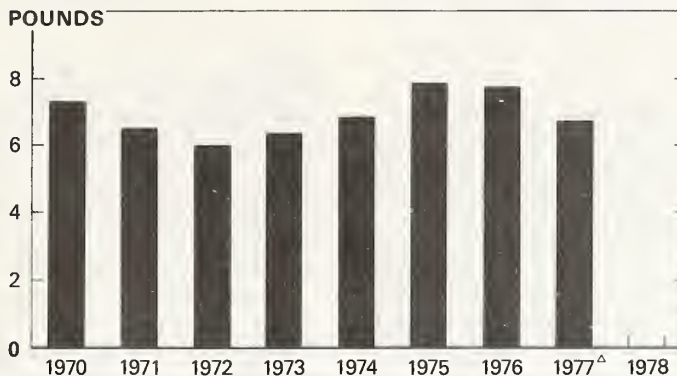
There are more than the usual uncertainties in the 1977 vegetable processing picture. The uncertainty over water supplies in the Pacific States and Idaho may bring on some changes not foreseen at this juncture. Tree and vine fruits would be expected to receive first consideration among farm crops, but vegetable acreage could possibly face some restriction, though perhaps not to the extent of field crops. However, reduced pea and sweet corn acreages may be expected, and the important tomato industry could get by with an acreage slightly smaller than last year. On the other hand, more vegetables for freezing could be handled as well as a larger pack of canned snap beans.

The possibility of reduced irrigation water supply in the West was discussed earlier in the FRESH VEGETABLES section. It should be added that processors who face 1977 crop reductions will now be more inclined to hold onto existing stocks.



FROZEN VEGETABLES*

January 1, Stocks per Capita



*EXCLUDES FROZEN POTATO PRODUCTS

ΔESTIMATED

USDA

NEG ERS 8599-77(2)

Substantially Less Raw Tonnage in 1976

Only 11.6 million tons, or 18 percent less, of 13 major processing vegetables were harvested last year. With lower prices paid producers in 1976, the farm value of these crops slipped off sharply, amounting to \$869 million compared to a record \$1.1 billion in 1975. While much of the decline in volume and value lay with tomatoes, all major items shared in the decline which was required to bring down burdensome supplies of finished goods.

Weather and labor-management disputes also contributed to reduced tonnage. The average yield of nine crops was off about 6 percent from the 1975 performance. Here too, the tomato industry was conspicuous with California yields cut 11 percent. By way of contrast, canning corn and pickling cucumber yields did better than in 1975.

Leading Processing Crops

Tomatoes

As previously stated, the tomato industry retrenched this past season, perhaps more than growers and canners had planned on earlier. In August, untimely rains hit California and a 10-day labor-management dispute late last July combined to challenge the skill and ingenuity of both growers and packers to get raw product into cans. U.S. tomato tonnage dropped sharply, and only 6.5 million tons were processed, compared with 8.5 and 7.0 million the previous 2 years. The other tomato States—Ohio, Indiana, New Jersey, and Pennsylvania had generally good yields in 1976.

Stocks of canned tomatoes on January 1 were 12 percent smaller than a year earlier with prices in

all areas registering higher. The beginning supply of tomato juice was also smaller, but movement to January 1 has been disappointing. As a result, January 1 stocks were 9 percent larger than last year.

Wholesale prices in January were the same as a year ago, except higher in California. Up to now, price and demand for tomato juice have probably in some measure been kept in check by the large quantities of frozen citrus juices. In view of Florida's recent crop damage, some slight strengthening in prices for tomato juice would not be surprising at this time.

Catsup, paste, and sauce packs, largely made in California were sharply cut last year. The general

Canned tomatoes: Supply and disappearance

	1974/75	1975/76	1976/77
	Mil. cases 24/303's	Mil. cases 24/303's	Mil. cases 24/303's
Carryover	3.1	5.3	12.0
Pack	43.8	53.5	42.6
Total supply	46.9	58.8	54.6
Disappearance	41.6	45.1	

Canned tomato juice: Supply and disappearance

	1974/75	1975/76	1976/77
	Mil. cases 24/303's	Mil. cases 24/303's	Mil. cases 24/303's
Carryover	4.9	5.7	6.6
Pack	36.1	35.4	32.2
Total supply	41.0	41.1	38.8
Disappearance	35.3	34.5	

consensus is that these tightened supplies will mean firm prices for the balance of the marketing season. With continued good demand for tomatoes and tomato products, it is probable that slightly less acreage would be needed for 1977.

Snap Beans

A substantially smaller crop has left current supplies of both canned and frozen snap beans much lighter than a year earlier. Stocks of canned on January 1 were 30.5 million cases 24/303's—23 percent smaller than a year earlier. Wholesale prices are higher than last year, and a continued strong market position is assured. The accompanying table shows that canned supplies and past disappearance are relatively close so the carryover next July will be on the small side.

The 1976 canned snap bean pack was 47.4 million cases, sharply less than in either of the two prior seasons. Stocks of frozen snap beans on January 1 were only 125 million pounds, the lowest since 1961.

Canned snap beans: Supply and disappearance

	1974/75	1975/76	1976/77
	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>
Carryover	5.2	15.3	13.6
Pack	62.3	55.4	47.4
Total supply	67.5	70.7	61.0
Disappearance ...	52.2	57.1	

Exports of snap beans in the 1976-77 marketing year likely will be a record high. For the five months, July-November 1976, 892,400 cases (24/303 basis) of canned snap beans had been exported—655,000 cases were exported in November alone. For the same five months of 1975, exports totaled 103,500 cases (24/303 basis). Ninety percent of the exports in November went to West Germany.

Sweet Corn

Although the pack of canned corn was reduced 5 percent last year, the total supply on hand at the beginning of the current marketing season was 64.4 million cases, a near record large supply. Early season disappearance has been sluggish, but the government purchase of more than a half million cases of 6/10's gave the market a degree of price stability. January 1 stocks of 38.8 million cases 24/303's were 9 percent larger than a year earlier. Prices for both consumer and institutional sizes have been weak all season, and most packs

Canned sweet corn: Supply and disappearance

	1974/75	1975/76	1976/77
	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>
Carryover	3.9	5.1	9.7
Pack	46.4	57.5	54.7
Total supply	50.3	62.6	64.4
Disappearance ...	45.2	52.9	

and styles can still be purchased wholesale for less than a year ago, which is in marked contrast to most processed vegetables.

Even though 7 percent less corn was frozen this year, the total supply was still slightly larger because of the relatively large carryover stocks. Combined stocks of cut and on-cob corn on January 1 were 9 percent larger than a year earlier and most of the increased supply is on-cob, now a heavy favorite with the fast food franchise industry. Thus far this season, shipments have been running well behind recent years, although some improvement in demand may be expected as canned and frozen snap beans are in light supply.

In an attempt to improve the current market position for sweet corn, it is likely that processors will be making a further slight acreage cut in 1977.

Peas

Although the 1976 pack of canned peas was curtailed, it was not enough to correct heavy supply positions that the industry has been dealing with for some time. The institutional market is somewhat less depressed than the retail side. A recent USDA purchase has helped here, too. Some moderate improvement in sales is expected between now and new pack time late this spring. Packers believe this may take the form of less dealing off posted prices. List prices in January were the same to less than a year earlier. At that time, stocks of 21.7 million cases 24/303's were 5 percent more than the generous quantity on hand a year ago. A reduced canning acreage is to be expected for 1977.

Stocks of frozen peas January 1 at 229 million pounds were 8 percent smaller than the burdensome quantity on hand a year earlier. In recent

Canned green peas: Supply and disappearance

	1974/75	1975/76	1976/77
	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>
Carryover	1.5	4.5	8.4
Pack	33.1	35.2	31.9
Total supply	34.6	39.7	40.3
Disappearance ...	30.1	31.3	

weeks, demand has improved and it appears that the industry will be in a normal carryover position by June. List prices for bulk and consumer sizes in January were the same as a year earlier.

Cucumbers for Pickles

Reduced acreage in 1976 resulted in 6 percent smaller quantities of pickling cucumbers produced this past year. Combined stocks of salted and dill types this past October 1, were 476,500 tons, 5 percent smaller than the generous quantity on hand a year earlier.

Spinach

While spinach canning activity declined in 1976, with total tonnage down sharply to 79,150 tons, freezing tonnage advanced slightly to 82,000 tons. Stocks of frozen spinach on January 1 amounted to 55 million pounds about the same as a year earlier, and January 1, 1977 canners' stocks at 3.4 million cases (24/303's) were 22 percent smaller than the ample amount of 4.4 million cases on hand for the same date a year ago.

Asparagus

Last year processing tonnage rebounded from a 1975 low, reaching 70,500 tons, valued at \$38 million. Most of the U.S. crop is frozen, and stocks are presently at the lowest in years. Only 8 million pounds were on hand January 1, leaving the prospect of negligible carryover on April 1. Canned asparagus stocks are the lightest of record, so the new crop will find packers receptive to rebuilding their supplies.

Beets

For the last two seasons, supplies of canned beets have been dropping down to a closer relationship with demand. Raw tonnage available for canning in 1976/77 dropped precipitously to 157,000 tons, a third less than a year ago and 35 percent below 2 years earlier. Stocks on January 1 at 8.1 million cases, (24/303's) reflect the reduced packing activity of the past season. January's wholesale prices were moderately higher than a year ago. Growers may provide moderately larger tonnage in 1977.

Sauerkraut

Three percent less cabbage tonnage was used for kraut this past season because of ample stocks on hand. January 1 inventories of 8.5 million cases (24/303 equivalent) were 5 percent smaller than a year earlier. Such a supply level suggests that little

change in 1977 cabbage requirements may be expected.

Other Frozen Vegetables

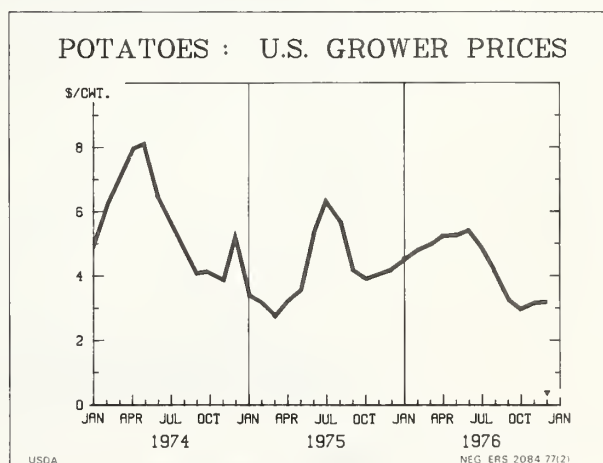
Stocks of *frozen carrots*, at 111 million pounds, are relatively light especially in view of the growing market for this item. The 1976 pack has not been reported, but the year 1975 was one of retrenchment, because before that time carrot stocks had been built to excessive levels. Frozen *cauliflower* supplies were also light on January 1 as raw tonnage used for this purpose fell below both the two prior seasons. With tonnage of *broccoli* used for freezing essentially the same as 1975, and January stocks the smallest in a decade, the 1977 market could absorb some increased pack activity in California. Wholesale prices advanced last fall, and have been well maintained since that time. As with carrots, this crop has been meeting increased demand throughout the 1970's.

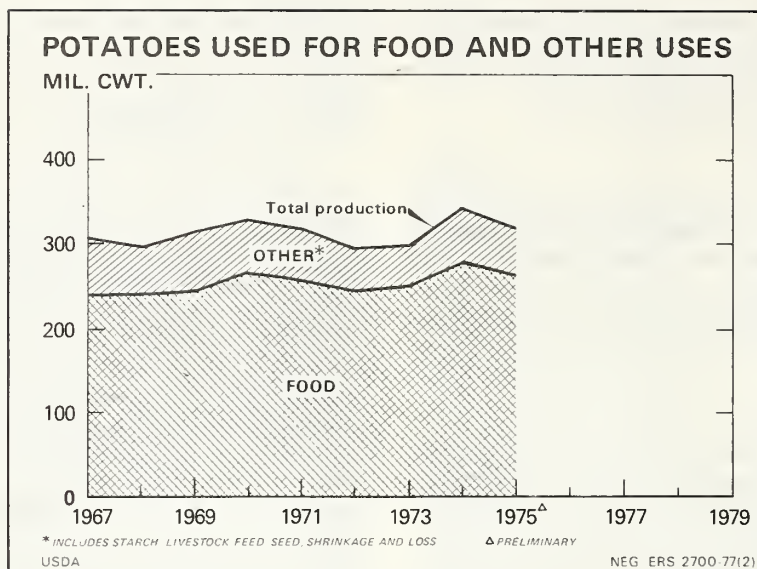
POTATOES

The total 1976 U.S. potato crop is estimated at 353.4 million cwt., 10 percent above the 1975 crop of 319.8 million cwt. and 3 percent above the previous record crop of 1974. The average yield was 257 cwt. per acre compared with 253 cwt. per acre in 1975 and 246 cwt. per acre in 1974. Average annual yields can be expected to increase further as more U.S. production shifts to the high yielding States of the West.

Marketing the 1976 Crop

Fall crop prices started out at depressed levels in all regions, as the available supply seemed almost overwhelming. Nonetheless, growers felt that the





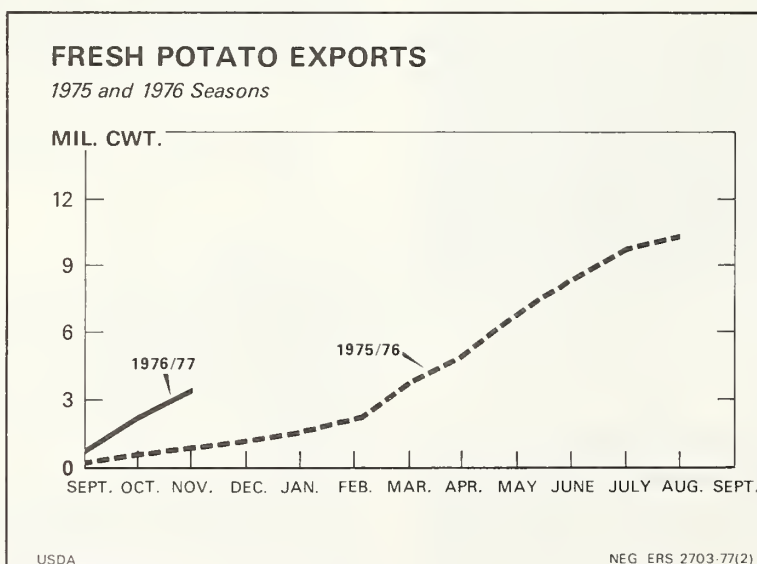
prospect of heavy sales to drought-stricken Europe was the way to ease the situation. The SRS average prices moved up only very little between October and December, going from \$2.98 to \$3.06 per cwt. for the United States. This was the lowest fourth quarter average since the 1972 season, a time when production costs were much lower. January prices moved up to \$3.40 per cwt. In the absence of export activity these prices might have even been lower.

Even though potato stocks still are record large they do not appear as formidable as earlier. Record disappearance has taken place during December and January. By January 1, stocks were reduced by a record 30 million cwt. Part of this went for

exports, and an increased tonnage went for domestic processing. February 1 stocks of 140 million cwt. confirm continued heavy disappearance of this record-large supply.

U.S. Potato Prices and European Demand

Maine has been supplying a good share of the potato demand originating from Europe. By the end of late January, approximately 2.8 million cwt. had moved out of that State alone. Additional quantities of table and seed stock have moved from Long Island and the Red River Valley, with lesser supplies moving out of some North Central States.



As a result, f.o.b. prices in several eastern and mid-western shipping points have advanced substantially since the beginning of the storage season. Approximately 5 million cwt. of fresh potatoes may have been exported between mid-September and late January. Export movement has averted what otherwise would have been a market disaster for potato growers East of the Rockies.

In the Pacific Northwest, the picture is different. This region once again had increased its 1976 production to record levels, leaving current stocks heaviest in this section of the country. Although the Pacific Northwest is least favorably located to supply table stock to Europe, the processing industry is actively supplying granules, flakes, and frozen fries to a variety of European outlets. Unfortunately for growers, movement through processing channels has only an indirect and delayed price impact.

Grower prices in Idaho have only recently shown any improvement and prices there are on a firmer basis now. Throughout the season, growers have been receiving \$2.00-\$2.50 per cwt. for cellar-run stock, less deductions for damage, etc. This is a "blend," or weighted average price for potatoes packed for fresh outlets and those processed in dehydrated form. F.o.b. prices for packed cartons containing 80-100 potatoes brought \$7.88 to \$7.95 per cwt. last November, and \$8.50 in late January. These prices are a third less than in early 1976.

In sharp contrast, Maine prices have moved steadily higher as the season progressed. F.o.b. prices for U.S. No. 1 table stock moved from \$3.46 per cwt. in late November to \$5.60 in late January. Although remaining stocks in Maine on February 1 were 12 percent smaller than a year earlier, these much improved current prices are still

sharply lower than a year ago. This reflects the heavy supply on hand elsewhere in the country. With a return to more typical weather patterns in Europe, the U.S. potato industry should not rely on continued heavy demand from that market in the 1977/78 season.

Projected Use of 1976 Tonnage

Table stock sales from the 1976 crop are estimated to reach 123.4 million cwt., about 10 percent greater than the 1975 fresh sales. In both cases, domestic use and exports are included. On the processing side, potato chips are expected to account for 36.0 million cwt., about a 5-percent increase over 1975. Frozen french fries and other frozen products are expected to account for 84.0 million cwt. or about 5 percent over last year, with some exports included here.

Dehydrated potato products are expected to account for 42 million cwt. of the 1976 potato crop

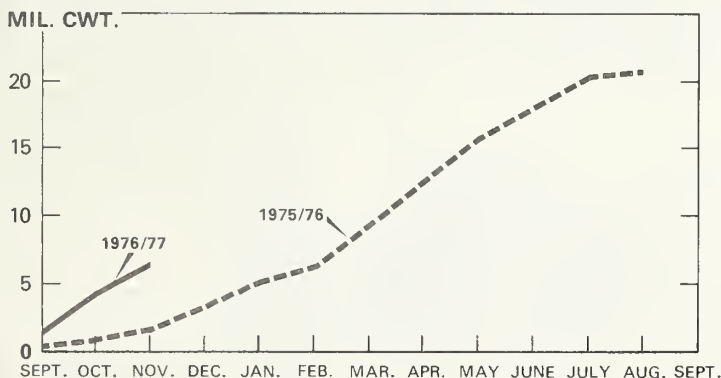
Retail potato price trends

Year	U.S. averages		
	Fresh 10 pounds	Frozen french fries 9 oz.	Dehydrated mashed 7 oz.
	Cents	Cents	Cents
1970	89.7	16.6	39.1
1971	86.1	16.3	40.1
1972	92.6	16.6	40.7
1973	136.9	17.2	42.7
1974	166.4	22.3	50.8
1975	134.4	25.6	55.7
1976	145.9	27.5	56.7

BLS data.

TOTAL POTATO EXPORTS*

1975 and 1976 Season



*FRESH AND PROCESSED COMBINED - FRESH WEIGHT BASIS

USDA

NEG ERS 2704-77(2)

or an increase of about 25 percent over 1975, with exports accounting for a substantial share of this increase.

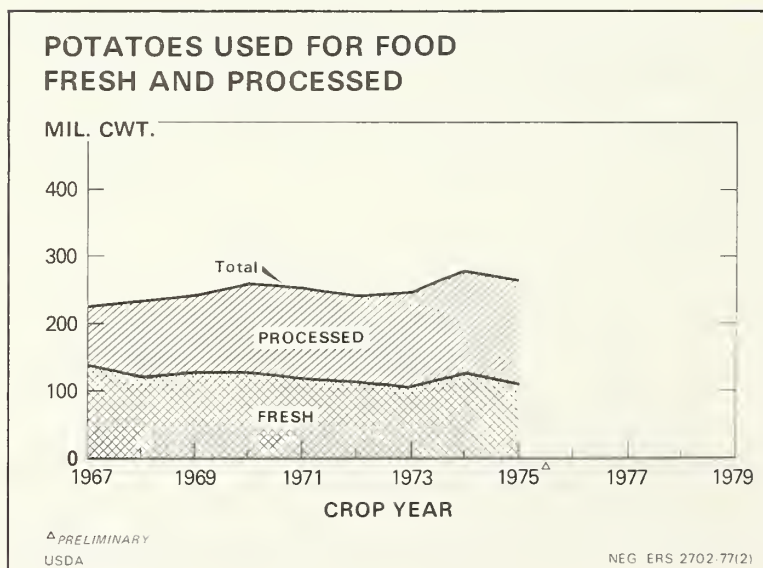
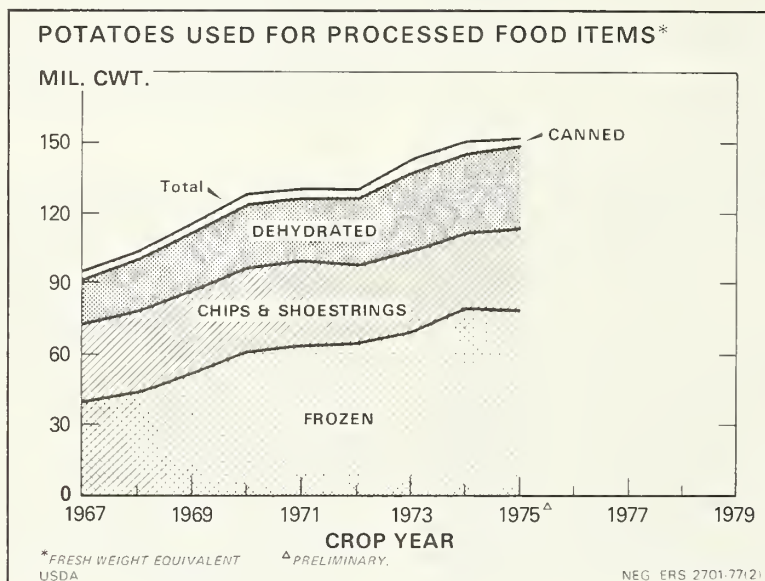
Canned, starch, and flour uses are expected to absorb about an additional 8.0 million cwt., which would be an aggregate increase over 1975 for those items.

Of the 1976 potato crop, about a 7-percent smaller quantity is expected to be used for seed. With a large crop as in 1976, there simply is less pressure to conserve a low-cost product. Waste shrink and loss can be expected to be substantially more. When prices are high, there is the tendency to move everything possible to market.

Winter and Spring Prospects

California and Florida expect 2.4 million cwt. of winter potato production this year, 21 percent less than 1976. There was little acreage lost in Florida, but vine damage in many fields was extensive enough to reduce yields. Cold weather and water shortages did not help California yields either.

Planted acreage for spring 1977 is estimated at 93,000 acres, 8 percent less than in 1976. If 1972-76 average yields are applied to each State's spring planting, 21.7 million cwt. would be produced. This compares to the 24.8 million cwt. of the 1976 spring crop. A 12-percent smaller spring crop this year would have moderate upward influence on prices.



Even as late as May, storage stocks of old crop potatoes will still be the dominant market feature.

The April 14 Report

The SRS will release the results of fall 1977 potato planting intentions on April 14. A year ago, the planting intentions report showed that growers had expected to increase their fall plantings by 3.8 percent over 1975. Yet the August 1976 crop indicated that growers actually planted about 8.5 percent more acreage of fall potatoes than in 1975, and with better than average yields, tonnage was actually a tenth more.

It is apparent to most potato trade observers that another fall crop as large as 302.8 million cwt. will not be needed next fall. Processors' stocks of finished potato products are expected to be at relatively high levels through much of 1977. Furthermore, the industry should not plan on continued heavy shipments to be needed in Europe, although some new processed export business may result from the current potato shortage in Europe. With a return of more normal weather conditions overseas, table stock exports to Europe are not expected to be much consequence in 1977. Total export activity for 1977/78 may likely account for 2 to 4 percent of the U.S. crop—a far cry from the currently expected 8 or 10 percent.

A fall crop of 275-280 million cwt. would be ample for next season's expected needs. This figure represents something a little more than 1975 but substantially less than 1976.

SWEET POTATOES

Final production estimates show 13.7 million cwt. of sweet potatoes produced in 1976, 1 percent more than last year. While yields were up over a year earlier, harvested acreage was essentially the same. One third of the 1976 crop originated in North Carolina with second place Louisiana providing another 21 percent.

With the exception of the first month, prices received by growers in the shipping season beginning last September have averaged substantially less than in the previous year. This price difference is rather surprising in view of the small change in supply. However, the late fall market is very sensitive to slight changes in supply. In October the spread was 27 cents, in November \$1.53, in December it was \$2.46, while in January it dropped to \$1.68. SRS prices of \$6.82 and \$7.36 in November and December compared with \$8.35 and \$9.82 a year earlier. The January price was \$8.02. These prices reflect both fresh and processed prices received by growers. Taking the fresh market side by itself, North Carolina and Louisiana prices in

mid-January were 75 cents per 50 pound crate below those of a year earlier. In California, prices were actually about 25 cents a crate above those a year ago.

Unloads of sweet potatoes at the major markets have been about 6 percent above a year earlier. This suggests smaller remaining stocks, and advancing prices the balance of the storage season. Monthly price differences between the current and previous seasons will be narrowing.

Canner interest in sweet potatoes did not become active until fairly recently. The carryover of the old pack on July 1 was 2.7 million cases of 24/30's, and October 1 stocks were a tenth below a year earlier. A disappointing rate of shipping between July 1 and October 1 largely explains the situation. But, the latest report of stocks shows supplies on hand January 1, 1977 were 4.2 million cases, a fifth less than last year. A 2-percent larger fall pack was made, and this means that movement through trade channels picked up markedly during the fourth quarter of 1976.

Nonetheless, February wholesale prices for canned sweets show a little upward change from the corresponding month of 1976.

So far in fiscal 1977 USDA has purchased 17.1 million pounds of syrup pack. A year earlier, 16.4 million pounds of syrup pack and 623,000 lbs. dehydrated were acquired by USDA.

MUSHROOMS

Mushroom prices to growers began the season at record high levels with prices for both fresh and processing stocks in the 70-75 cents per pound range. By early December, a downward trend began which has continued to the present time. Prices for fresh clean cut stock for repacking in late January were still averaging a healthy 68-70 cents a pound, while clean-cut processing stock was reported to be running 65-66 cents a pound. At this time a year ago, prices were advancing, with both fresh market and processing prices passing the 58-cent level late in January. Lower prices this season reflect larger volumes of domestic production.

Canned imports, mostly from Taiwan and Korea, were 40 percent larger in July-December 1976. Practically all this increase over a year earlier took place during the months of July and August, causing great concern on the part of Pennsylvania processors. Quantities reaching the United States after September 1 were below the year-earlier figures.

The domestic canning industry is presently in something of a "hold" position, waiting to see what action the President's Office will be taking in regard to the 48 million pound import quota recom-

mended by the International Trade Commission (ITC). Twice in 1976, domestic canners and their representatives appealed to the ITC to seek relief from foreign competition.

With added volumes of mushrooms again available from domestic and foreign sources, the stage now seems set for another season of increased domestic use, and further gains in per capita use are expected for 1976/77.

DRY EDIBLE BEANS

Because of a lack of strong export demand and the sluggish domestic movement of major bean classes, dry edible bean prices continue to be in the doldrums. The SRS average price of \$15.20 per cwt. for all classes in September 1976 was lower than any monthly price during the previous season. Prices have held generally steady since that time. Blackeye peas, large limas, and garbanzos from California are exceptions to this slack demand pattern.

The recently released USDA Annual Crop Summary shows that the total dry bean production in 1976 was 17.2 million cwt., 1 percent less than in 1975 and 18 percent less than the record high in 1974. While an unfavorable season in Michigan reduced yields in that important State, changes elsewhere were less severe. Even so, acreages were large enough to raise total production of white classes 12 percent above the record low of 1975. However, the 1976 output of white classes was still roughly a third below 1974. On the other hand, the colored bean harvest was 10 percent smaller, compared to 1975. Pinto and most other colored bean growers reduced plantings in 1976 because export

sales the previous year did not materialize as expected.

Exports of all classes of dry beans in September through December 1976, as reported by the Bureau of the Census, are expected to total 1.4 million cwt. Export activity for a year earlier was 1.0 million cwt. and for 2 years earlier 2.1 million cwt. Even with a slightly smaller crop this season, export activity during September through December has been running ahead of last year. These gains were not large enough to stimulate grower prices.

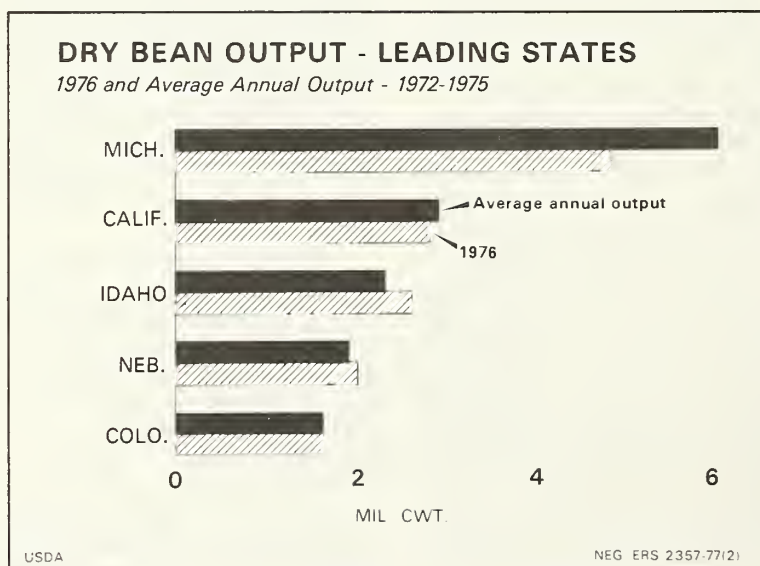
During the entire 1975/76 season, 2.7 million cwt. were shipped, about one half the quantity of 1974/75.

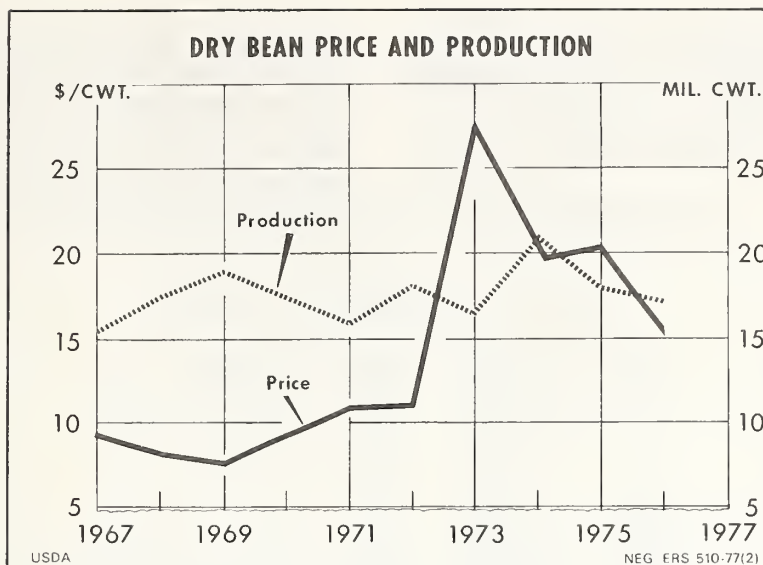
U.S. Price Review By Classes

Even though 1976 production of pinto and other colored beans has been below that of last year, prices for these classes have been running well below the two previous seasons. January quotes from Colorado show Pinto prices in the \$13 per cwt. range against prices in the \$17 range of a year ago and the \$30 range of 2 years ago. For September through December of the 1976/77 season, exports of pinto beans were at a rate 2½ times greater than a year earlier; but existing supplies have not been sufficiently depleted to have an impact on prices.

Kidney bean prices of \$17.75 per cwt. were the lowest since September 1972. Kidney bean exports during September and October were two times greater than a year earlier. Yet prices continued down to the present low levels.

Blackeye pea production in 1976 was a fifth larger than it was in 1975. However, in spite of a production increase, supplies are rather short and domestic demand appears to be increasing. Dealer





prices rose from \$21.75 cwt. in early September to \$31.00 the last week of October and dipped slightly to \$29 and \$30.50 during November and December. Prices recovered to the \$31 level during the third week of January, reaching \$36.75 in early February.

Even though 1976 production of large limas was up by nearly 30 percent over a year earlier, prices have been near the \$40 level since October and large limas have continued to be in short supply, in relation to existing demand. Conversely, despite a smaller 1976 production, baby lima prices have only risen to the \$19 level.

Among the white classes, Michigan pea bean prices have ranged from a high of around \$22 in early September to \$16.50 during December and January. The current price is less than one-half that of a year ago. Exports during September and October of the 1976/77 marketing season were at a rate below those of a year earlier even though production is about 6 percent greater.

Roughly the same type of price pattern prevails with the Great Northern crop. With a crop 25 percent larger than in 1975, prices continued downward with the start of the 1976/77 season and have been mostly in the \$15-\$16 range since October. Exports during September and October of the 1976/77 marketing year have been at a rate over three times of those a year earlier, but not enough.

Retail price trends as reported by the Bureau of Labor Statistics (BLS) represent only pea beans and occasionally great northern. Reported retail prices have been edging downward in an almost uninterrupted pattern from 54.6 cents per pound in January 1976 to 42.7 cents in December.

Outlook for 1977

Although there have been two seasons with relatively light crops, prices to growers certainly have not reflected this, due to previously described lack of demand. With prices still depressed late this winter, there may be little incentive to increase 1977 plantings of the major classes. Rough data indicate that domestic use during calendar 1975 and 1976 slackened, and appears to have dropped from 14 million bags to a little more than 13 million in both years. Some dealers expect the surge of abnormally cold weather in the East and Midwest to stimulate domestic demand to some degree. Early February prices do show increases for most classes, as some concern about western water supplies and 1977 plantings is expressed.

There is some possibility that pinto and great northern beans may be approved for foreign aid programs. Should this materialize before planting time, and if any significant large quantities are booked for this purpose, some renewed interest in planting could take place. For the past 10 years, average annual bean production has been about 17.4 million cwt., ranging from a low of 15.2 million to a high 20.3 million.

DRY EDIBLE PEAS AND LENTILS

The 1976 dry pea crop of 2.2 million cwt. was 21 percent below the moderate crop of 1975, with a sharp cut in acreage in both Idaho and Washington. Lentil production in 1976 was also below last year's record level.

With lower production in 1976, prices for all classes have been above those a year earlier. The December SRS price of \$10.20 per cwt. compares

with \$6.45 a year earlier. FOB prices for greens and yellows in Pacific Northwest in early February were in the \$11.50-\$13.50 range compared to \$6.50-\$6.75 a year earlier. Blacks were \$12.75-\$13.00 compared to \$9.50 a year ago. Lentil prices were up even more into \$26 compared to \$14.25 a year earlier.

Total dry pea and lentil exports the first 4 months of the current shipping season were 45 percent larger than the 1975 figures. A total of 1.2 million cwt. had moved as of January 1, 1977. A year earlier the comparable figure was .8 million cwt. India, Japan, and the United Kingdom had made considerable increases in their purchases.

Table 1—Potatoes: January 1 total stocks by areas, United States

Year	Eastern States	Central States	Western States	Total ¹
	<i>Mil. cwt.</i>	<i>Mil. cwt.</i>	<i>Mil. cwt.</i>	<i>Mil. cwt.</i>
1970	37.0	28.0	73.2	138.1
1971	38.0	29.9	82.0	150.0
1972	38.0	34.1	79.3	151.4
1973	28.0	27.6	78.8	134.3
1974	25.3	28.0	80.3	133.6
1975	35.2	35.3	92.4	162.9
1976	27.0	27.8	102.2	157.0
1977	25.9	28.8	114.5	169.2

¹ May not add to total due to rounding.

Table 2—U.S. exports of dried edible beans by country of destination

Country	Marketing year beginning		
	Sept. 1973	Sept. 1974	Sept. 1975
	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>
United Kingdom	801.4 ¹	367.9 ¹	528.1 ¹
Japan	133.0	375.4	220.4
Venezuela	47.0	96.7	77.2
Mexico	517.0	1,790.0	214.5
France	246.5	242.2	161.5
Netherlands	167.8	243.0	291.6
Dominican Republic ...	178.3	5.6	211.0
Australia	109.3	114.2	47.6
Algeria	275.0	371.8	106.9
Other countries	862.9	1,510.4	857.8
Total U.S. exports ...	3,338.2	5,117.2	2,716.6

¹ Includes Northern Ireland.

Table 3—Beans dry edible: Production by commercial classes, 1971-76

Class	1971	1972	1973	1974	1975	1976 ¹
	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>
White:						
Pea, navy	5,022	6,450	4,882	6,737	4,083	4,315
Great northern	1,517	1,515	1,776	2,088	1,413	1,771
Small white ²	378	397	421	666	239	335
Yelloweye	(³)	(³)	(³)	(³)	(³)	(³)
Total, White	6,917	8,362	7,079	9,491	5,735	6,421
Colored:						
Pink	724	624	804	1,030	1,154	990
Pinto	4,843	5,613	4,622	4,758	6,391	5,716
Red kidney	1,123	816	1,145	1,513	1,484	1,433
Small red	371	371	318	447	494	437
Cranberry	112	257	205	162	222	280
Black turtle soup	279	144	135	192	213	118
Total, colored	7,452	7,825	7,229	8,102	9,958	8,974
Lima:						
Large	398	471	533	670	408	522
Baby	400	317	378	574	416	378
Total, lima	798	788	911	1,244	824	900
Other:						
Blackeye	413	801	766	1,092	499	607
Garbanzo	85	60	98	83	119	46
Other ⁴	252	282	306	331	287	268
Total, other	750	1,143	1,170	1,506	905	921
United States	15,917	18,118	16,389	20,343	17,422	17,216

¹ Preliminary. ² Includes flat small white. ³ Included in "Other". ⁴ Does not include beans grown for garden seed.

Data from Crop Production, SRS, USDA.

Table 4—Vegetables and melons for fresh market: Commercial acreage, production, and value for principal crops, 1974, 1975, and 1976¹

	Harvested acreage				Production				Value			
	1974	1975	1976	1974	1975	1976	1974	1975	1976	1974	1975	1976
	1,000 acres	1,000 acres	1,000 acres	1,000 cwt.	1,000 cwt.	1,000 cwt.	Dollars	Dollars	Dollars	1,000 dollars	1,000 dollars	1,000 dollars
Artichokes	10.8 ²	10.2 ²	10.6 ²	702 ²	734 ²	806 ²	17.30 ²	16.10 ²	14.40 ²	12,152 ²	11,847 ²	11,568 ²
Asparagus	112.5 ²	102.6 ²	92.6 ²	824	874	912	33.40	34.00	38.10	27,489	29,695	34,758
Beans, snap	83.0	84.2	84.4	2,923	3,179	3,027	18.60	19.60	20.20	54,439	62,303	61,146
Broccoli	49.4 ²	49.7 ²	53.8 ²	1,590	2,035	2,131	17.10	17.40	18.80	27,264	35,376	40,120
Brussels sprouts ..	5.7 ²	5.8 ²	4.9 ²	656 ²	696 ²	490 ²	18.60 ²	17.50 ²	19.40 ²	12,169 ²	12,205 ²	9,530 ²
Cabbage ³	105.6 ²	103.1 ²	98.8 ²	24,747 ²	24,775 ²	23,417 ²	3.89 ²	4.59 ²	4.45 ²	95,409 ²	112,613 ²	103,098 ²
Cantaloups ⁴	69.9	75.2	73.2	9,730	9,787	9,853	9.99	10.50	11.00	97,180	102,356	108,075
Carrots	77.4 ²	70.4 ²	75.5 ²	13,043	12,727	13,267	7.64	9.32	7.84	99,599	118,628	103,965
Cauliflower	32.2 ²	32.0 ²	33.8 ²	1,553	1,755	2,036	17.80	19.90	20.90	27,653	35,000	42,470
Celery	32.7 ²	31.8 ²	33.3 ²	16,476 ²	15,826 ²	16,722 ²	5.70 ²	7.46 ²	8.22 ²	93,956 ²	118,122 ²	137,374 ²
Corn sweet	169.6	171.1	173.8	13,000	13,566	13,951	7.84	8.45	8.23	101,940	114,606	114,849
Cucumbers	45.9	47.6	49.6	4,639	4,819	5,079	10.40	10.40	9.66	48,283	49,946	49,073
Eggplant	3.2	3.4	3.4	605	701	680	11.60	10.40	10.60	7,042	7,289	7,240
Escarole	8.3	7.6	7.6	1,123	1,092	1,072	12.10	12.10	14.00	12,157	13,195	14,990
Garlic	9.0 ²	10.8 ²	8.8 ²	1,170 ²	1,404 ²	924 ²	12.20 ²	13.10 ²	12.80 ²	14,265 ²	18,415 ²	11,792 ²
Honeydews	12.4	12.6	14.4	2,185	2,395	2,207	8.23	9.31	10.60	17,993	22,286	23,409
Lettuce	228.0	228.6	222.5	51,394	53,632	53,275	6.92	6.82	8.89	355,536	365,608	473,837
Onions	109.3 ²	102.9 ²	107.8 ²	33,045 ²	31,362 ²	34,354 ²	4.87 ²	9.35 ²	5.43 ²	146,754 ²	265,812 ²	167,135 ²
Peppers, green	48.6 ²	50.5 ²	53.6 ²	5,231 ²	5,106 ²	5,152 ²	14.50 ²	16.60 ²	17.10 ²	76,021 ²	84,892 ²	88,149 ²
Spinach	9.7	9.0	9.1	607	629	696	15.10	16.40	17.90	9,176	12,425	12,425
Tomatoes	124.4	124.9	128.9	19,968	20,976	21,492	17.30	18.60	19.80	345,241	390,985	425,887
Watermelons	215.4	213.6	234.6	23,220	24,300	26,073	3.81	4.00	3.26	88,572	97,299	85,010
Total	1,563.0	1,547.6	1,575.0	228,431	232,370	237,616	273.59	291.90	301.58	1,770,290	2,078,783	2,125,900

¹ Includes Hawaii.² Includes quantities used for processing.³ Price computed from value and production less not marketed.⁴ Includes Casabas, Persians, and other muskmelons.

Table 5—Vegetables, fresh: Representative wholesale prices (wholesale lot) sales at New York and Chicago for stock of generally good quality and condition (U.S. No. 1 when available) indicated periods, 1975, 1976, and 1977

Market, commodity and State of origin	Unit	Tuesday nearest mid-month					
		1975-76			1976-77		
		Nov. 11	Dec. 9	Jan. 13	Nov. 16	Dec. 14	Jan. 11
		<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
NEW YORK							
Beans, snap							
round green type (Florida)	Bu. hamper and crt.	8.25	8.75	12.00	11.50	7.25	11.50
Broccoli, bunched (California)	14's crt.	5.00	6.75	6.38	8.00	9.00	9.25
Cabbage, domestic round type (Florida)	1-3/4 bu. crt.	---	5.00	5.50	---	---	9.00
Cabbage, Danish type (New York)	50-lb. sack	2.62	3.75	4.25	4.25	4.50	7.25
Carrots, topped, washed (California) . .	48-1-lb. film bag ctn.	6.75	6.50	6.75	9.00	10.75	14.00
Celery, Pascal (Florida)	2-4 doz. 16 in. crt.	---	10.25	11.00	10.00	7.25	13.50
Celery, Pascal (California)	2-3 doz. 16 in. crt.	10.00	14.00	13.00	12.25	9.00	15.50
Corn, sweet, yellow (Florida)	4 1/2-5 doz. crt.	7.00	8.50	5.88	5.00	5.12	7.00
Cucumbers, (Florida)	Bu. basket	6.75	10.50	---	13.50	9.50	---
Lettuce, Iceberg type (Arizona)	2 doz. ctn.	6.75	6.50	7.25	7.25	6.75	9.25
Onions, yellow, medium (New York) . .	50-lb. sack	5.35	5.60	6.50	---	4.65	---
Peppers, green, California Wonder (Florida)	Bu. basket	7.50	8.00	7.25	11.00	6.25	12.50
Spinach, savoy type (Texas)	Bu. basket	---	7.00	6.00	6.50	8.50	8.50
CHICAGO							
Beans, snap							
round green type (Florida)	Bu. hamper	6.25	10.25	12.25	13.00	8.25	13.50
Broccoli (California)	14's crt. and ctn.	6.00	6.50	6.00	7.75	7.25	8.25
Cabbage, domestic round type (Texas) .	1-3/4 bu. crt.	---	4.50	5.50	---	---	9.50
Carrots, topped, washed (California)	48-1-lb. film bag, mesh master	6.85	5.00	---	8.25	9.75	---
Cauliflower (California)	Film wrapped 12's ctn.	5.75	8.00	9.00	9.25	9.75	12.50
Celery, Pascal type (California)	2-3 doz. 16 in. crt.	9.25	13.00	12.00	11.50	7.00	13.50
Corn, sweet, yellow (Florida)	5 doz. crt.	7.00	---	6.50	5.50	5.00	6.00
Cucumbers (Florida)	Bu. basket	7.25	11.50	---	20.00	14.00	---
Lettuce, Iceberg type (Arizona)	2 doz. heads, ctn.	5.75	6.75	7.15	---	5.75	7.75
Onions, yellow, large (Idaho)	50 lb. sack	7.00	9.25	9.00	3.90	5.38	5.87
Onions, yellow, medium (Midwestern) .	50 lb. sack	4.85	5.25	5.17	3.55	4.00	4.75
Peppers, green, California Wonder type, large (Florida)	Bu. basket	---	10.25	8.75	9.25	8.50	13.50
Tomatoes, greenhouse, medium (Midwestern)	8 lb. Bu. basket	---	3.50	---	4.00	---	---

Weekly summary of terminal market prices, AMS, USDA, Market News Report.

Table 6—Vegetables, fresh: Average f.o.b. shipping point prices, per hundredweight, United States, indicated periods, 1975, 1976, and 1977

Commodity	1975		1976				1977
	November	December	October	November	December	December 1-15	January 1-15
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Beans, snap	20.00	19.60	20.90	22.00	18.20	17.50	26.10
Broccoli	18.10	18.70	---	---	---	---	---
Cabbage	5.10	5.40	5.18	6.76	8.20	7.29	11.70
Cantaloups	10.40	8.40	9.90	9.90	---	---	---
Carrots	7.50	7.32	9.71	9.90	11.80	11.10	14.30
Cauliflower	17.30	20.80	---	---	---	---	---
Celery	8.94	12.50	5.62	9.00	7.55	6.62	12.90
Corn, sweet	11.20	12.50	7.83	7.51	5.55	6.30	8.30
Cucumbers	11.80	15.50	9.19	17.50	14.50	14.80	12.80
Lettuce	7.87	8.55	14.20	8.56	7.34	7.42	11.10
Onions	9.64	11.40	5.48	5.43	6.99	6.39	9.42
Peppers, green	18.20	19.50	16.00	25.20	19.60	19.80	26.10
Spinach	15.60	15.60	---	---	---	---	---
Tomatoes	19.30	19.60	21.90	26.60	20.80	21.10	22.80

Agricultural Prices, SRS, USDA, issued monthly.

Table 7—Vegetables, commercial for fresh market: Index numbers (unadjusted) of prices received by farmers, as of 15th of the month, United States, by months¹

(1967=100)

Period	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Av.
1935-39	35	37	40	40	39	30	27	25	25	28	32	36	33
1947-49	89	94	96	95	85	66	64	60	59	63	74	76	77
1950-54	87	82	78	91	82	75	72	62	57	66	77	83	76
1955-59	83	90	91	89	84	77	72	63	64	70	78	79	78
Year													
1960	99	95	87	88	90	74	76	62	61	67	73	77	79
1961	74	74	76	95	83	90	81	65	65	65	76	74	76
1962	94	102	125	109	107	84	73	63	64	66	75	85	87
1963	102	95	82	83	78	88	85	65	62	70	91	94	83
1964	100	103	98	89	83	90	80	76	76	78	101	87	88
1965	78	83	97	107	127	103	84	77	78	87	89	87	91
1966	110	115	101	108	94	99	115	102	91	92	101	95	102
1967	100	94	96	110	104	128	109	84	80	88	101	104	100
1968	119	117	125	129	105	98	92	86	92	91	113	118	107
1969	104	109	113	110	118	97	97	94	90	111	151	130	110
1970	130	123	123	109	121	110	101	96	111	95	102	95	110
1971	111	116	149	135	126	127	119	101	99	121	172	138	126
1972	155	131	115	134	122	123	116	125	129	112	147	139	129
1973	155	154	170	200	190	190	179	131	125	122	127	129	156
1974	136	162	131	151	170	171	151	140	140	163	167	146	152
1975	169	169	166	177	169	204	178	157	159	159	174	189	173
1976 ²	191	163	179	177	140	157	170	161	176	191	189	172	172

¹ The index for commercial fresh market vegetables was revised, beginning January 1958, to reflect changes in the method of reporting prices. All prices now are reported on a f.o.b. basis. ² Preliminary.

Agricultural Prices, SRS, USDA, issued monthly.

Table 8—Vegetables for commercial processing: Acreage, production, and season average price per ton, 1974, 1975, and 1976

Commodity	Harvested acreage			Production			Price per ton		
	1974	1975	1976	1974	1975	1976	1974	1975	1976
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 tons</i>	<i>1,000 tons</i>	<i>1,000 tons</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Asparagus	N.A.	N.A.	N.A.	89	63	70	526.00	501.00	537.00
Beans, lima ¹									
Canning	23	31	23	18	30	19	262.00	295.00	251.00
Freezing	50	46	25	71	66	36	329.00	333.60	306.05
Beans, snap									
Canning	230	224	191	586	531	467	149.00	152.00	138.00
Freezing	61	50	46	162	135	121	186.00	161.00	138.00
Beets	18	18	14	241	231	157	41.00	38.20	38.50
Cabbage for kraut	14	12	11	281	239	232	31.00	31.30	31.20
Corn, sweet ²									
Canning	335	381	340	1,386	1,644	1,546	48.20	49.40	45.50
Freezing	124	125	117	672	736	650	66.50	62.70	54.80
Cucumbers for pickles	132	138	128	597	674	634	131.00	129.00	126.00
Peas, green ¹									
Canning	270	287	262	223	213	311	189.00	221.00	203.00
Freezing	148	146	123	341	348	180	206.00	214.00	190.00
Spinach									
Canning	11	15	13	74	91	79	56.62	68.63	72.26
Freezing	14	9	9	100	68	82	56.90	59.23	59.18
Tomatoes	338	384	309	7,020	8,504	6,472	64.50	63.20	58.00
Broccoli	N.A.	N.A.	N.A.	117	95	96	245.00	253.00	247.00
Carrots	N.A.	N.A.	N.A.	465	316	341	40.40	43.60	39.50
Cauliflower	N.A.	N.A.	N.A.	74	62	59	161.00	169.00	171.00
Total ³	N.A.	N.A.	N.A.	12,519	14,047	11,552	82.54	79.29	75.26

¹ Production and price on a "shelled" basis. ² Corn in the husk. ³ May not add to total due to rounding.

N.A. Not available.

Vegetable—Processing, annual summary, SRS, USDA.

Table 9—Vegetables, frozen: Cold storage holdings and indicated disappearance, September 1 to December 31

Commodity	December 31			September 1-December 31 net change		
	1974	1975	1976 ¹	1974	1975	1976 ¹
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Asparagus	12	9	8	-7	-8	-9
Beans, lima:						
Forkhook	30	35	23	15	17	-4
Baby	68	78	56	45	36	13
Total	98	113	79	60	53	9
Beans, snap:						
Regular	125	148	86	-13	-22	-37
French style	54	48	39	-12	-8	-12
Total	179	196	125	-25	-30	-49
Broccoli:						
Spears	59	47	27	7	-5	-11
Chopped and cuts	37	33	23	-3	-6	-10
Total	96	80	50	4	-11	-21
Brussels sprouts	47	49	37	28	30	19
Carrots:						
Diced	156	130	76	82	49	53
Other	(⁴)	(⁴)	35	(⁴)	(⁴)	2
Total	156	130	111	82	49	55
Cauliflower	69	66	47	32	25	15
Corn, sweet:						
cut	224	250	254	132	120	120
on-cob	95	115	142	57	75	86
Total	319	365	397	189	195	206
Mixed vegetables	35	37	33	7	3	(¹)
Okra	34	29	23	-9	-6	-8
Onions:						
Rings	11	11	12	(¹)	3	(¹)
Other	18	12	14	-1	-1	(¹)
Total	29	23	26	-1	2	(¹)
Peas, Blackeyed	14	13	14	-3	(¹)	3
Peas, green	221	250	229	-110	-148	-156
Peas and carrots	13	12	12	3	(¹)	(¹)
Spinach	69	55	55	-30	-39	-47
Southern greens	42	32	30	-3	7	2
Other vegetables	213	199	171	64	32	9
Total vegetables ²	1,645	1,662	1,446	280	155	24
Potatoes:						
French fried	564	570	649	294	132	236
Other potato products	129	112	102	36	14	6
Total frozen potatoes	693	682	751	330	146	242
Grand Total ²	2,338	2,345	2,197	610	301	266

¹ Preliminary. ² May not add to total due to rounding. N.A.—Not available. ³ Less than .50. ⁴ Reported separately beginning Feb. 1, 1975.

Cold storage, SRS, USDA, issued monthly.

Table 10—Fresh Vegetables: Retail price, marketing margin, and farm value per unit, sold in New York City, indicated months, 1975 and 1976

Commodity, month, and retail unit	Retail price	Marketing Margin		Farm Value ^{1, 2}	
		Absolute	Percentage of retail value	Absolute	Percentage of retail value
	<i>Cents</i>	<i>Cents</i>	<i>Percent</i>	<i>Cents</i>	<i>Percent</i>
Carrots (Pound)					
November 1976	30.6	19.7	64	10.9	36
October 1976	28.5	15.6	55	12.9	45
November 1975	24.8	16.2	65	8.6	35
Celery (Pound)					
November 1976	29.8	22.8	76	7.0	24
October 1976	29.2	23.4	80	5.8	20
November 1975	31.9	17.2	54	14.7	46
Lettuce (Head)					
November 1976	65.1	44.7	69	20.4	31
October 1976	76.1	35.8	47	40.3	53
November 1975	48.2	30.2	63	18.0	37
Onions, dry yellow (Pound)					
November 1976	20.3	12.9	64	7.4	36
October 1976	21.1	13.7	65	7.4	35
November 1975	23.2	13.8	59	9.4	41
Potatoes, round white (Pound)					
November 1976	14.1	9.4	67	4.7	33
October 1975	14.2	10.0	70	4.2	30
November 1975	15.2	10.0	66	5.2	34
Potatoes, Russet (Pound)					
November 1976	19.2	15.0	78	4.2	22
October 1976	20.3	14.9	73	5.4	27
November 1975	22.9	15.1	66	7.8	34
Sweetpotatoes (Pound)					
November 1976	25.2	15.5	62	9.7	38
October 1976	26.0	14.9	57	11.1	43
November 1975	27.8	15.0	54	12.8	46

¹ For quantity of product equivalent to retail unit sold to consumers: Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. ² Production areas:

Carrots-California, Celery-California, Lettuce-California, Onions-New York, Potatoes, round white-New York, Potatoes, Russet-Idaho; Sweetpotatoes-North Carolina.

Table 11—Fresh Vegetables: 1976 representative truck rates for selected items¹

Commodity, area, and city	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
<i>Dollars per package</i>												
Carrots (48/1-lb film)												
California points to: ²												
Chicago	2.15	2.15	2.30	2.77	2.12	2.12	2.75	2.75	2.50	2.50	2.50	2.30
Los Angeles .....	.50	.50	.50	.50	.65	.65	.65	.65	.65	.65	.65	.50
New York City	2.92	2.92	3.07	3.54	3.00	3.00	3.25	3.25	2.75	2.75	3.00	3.07
Rio Grande Valley, Texas to:												
Chicago	1.35	1.35	1.35	1.35	1.35	1.35	---	---	---	---	---	---
New York City	2.15	2.15	2.15	2.15	2.15	2.15	---	---	---	---	---	---
Celery (wirebound crate)												
Southern California to:												
Chicago	2.18	2.18	2.25	2.25	2.40	2.75	2.90	2.82	2.68	2.75	2.70	2.28
Los Angeles .....	.32	.32	.32	.32	.32	.38	.38	.38	.38	.38	.38	.38
New York City	2.85	2.85	2.88	2.88	3.12	3.75	3.88	3.82	3.75	3.85	3.70	3.18
Southern Florida to:												
Atlanta	1.25	1.25	1.25	1.25	1.25	1.25	---	---	---	---	---	---
Chicago	1.75	1.75	1.75	1.75	1.75	1.75	---	---	---	---	---	---
New York City	1.65	1.65	1.65	1.65	1.65	1.65	---	---	---	---	---	---
Corn (wirebound crate)												
Southern Florida to:												
Chicago	1.45	1.45	1.45	1.45	1.45	1.45	---	---	---	---	---	---
Los Angeles	1.35	1.35	1.35	1.35	1.35	1.35	---	---	---	---	---	---
New York City	1.90	1.90	1.90	1.90	1.90	1.90	---	---	---	---	---	---
Cucumbers (1½ bu crate)												
Southern Florida to:												
Chicago	1.75	1.75	1.75	1.75	1.75	1.75	---	---	---	---	---	---
New York City	1.65	1.65	1.65	1.65	1.65	1.65	---	---	---	---	---	---
Lettuce (24-head ctn.)												
California points to: ²												
Atlanta	1.88	1.88	2.00	2.37	2.25	2.25	2.88	2.88	2.50	2.50	2.50	2.00
Chicago	1.75	1.75	1.87	2.25	2.12	2.12	2.75	2.75	2.50	2.50	2.50	1.87
Dallas	1.06	1.06	1.12	1.25	1.62	1.62	2.00	2.00	2.25	2.25	2.25	1.50
Los Angeles .....	.40	.40	.40	.40	.45	.45	.45	.45	.45	.45	.45	.40
New York City	2.38	2.37	2.50	2.88	3.00	3.00	3.25	3.25	2.75	2.75	3.00	2.50
Onions dry (50-lb. sack)												
Rio Grande Valley, Texas to:												
Atlanta	---	.90	.90	.90	.90	.90	.90	---	---	---	---	---
Chicago	---	1.10	1.10	1.10	1.10	1.10	1.10	---	---	---	---	---
New York City	---	1.70	1.70	1.70	1.70	1.70	1.70	---	---	---	---	---
Potatoes (100 lb. sack)												
Idaho Falls, Idaho to:												
Atlanta	3.25	3.25	3.25	3.25	---	---	---	---	3.38	3.38	3.38	3.38
Chicago	2.45	2.45	2.45	2.40	---	---	---	---	2.55	2.55	2.55	2.55
Los Angeles	1.30	1.30	1.25	1.25	---	---	---	---	1.25	1.25	1.25	1.25
New York City	4.00	4.00	4.00	4.00	---	---	---	---	4.25	4.25	4.25	4.25
Presque Isle, Maine to:												
Boston .....	.90	.90	.90	.90	.90	.90	---	---	.90	.90	.90	.90
New York City	1.40	1.40	1.40	1.40	1.40	1.40	---	---	1.40	1.40	1.40	1.40
Tomatoes (20-lb. ctn.)												
Southern Florida to:												
Chicago .....	.70	.70	.70	.70	.70	---	---	---	---	---	.70	.70
New York City .....	.65	.65	.65	.65	.65	---	---	---	---	---	.65	.65

¹ Reported from a sample of shippers and/or truck brokers in specified areas for shipments during the first week of month.² Imperial Valley: Jan.-Apr., Dec. Salinas-Watsonville: May-Nov.

Table 12—Potatoes, Irish: Acreage, yield per acre, and production, 1974, 1975, and 1976

Seasonal group	Harvested acreage			Yield per acre			Production		
	1974	1975	1976 ¹	1974	1975	1976 ¹	1974	1975	1976 ¹
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>
Winter	13.7	14.3	14.4	214	202	207	2,933	2,887	2,984
Spring	103.4	84.5	99.0	242	237	250	25,032	19,994	24,779
Summer	133.3	115.7	120.3	191	190	190	25,421	20,898	22,805
Fall									
8 Eastern	238.5	209.7	199.5	253	230	251	60,274	48,394	50,148
8 Central	328.9	270.9	299.6	199	200	191	65,359	54,097	57,157
8 Western	573.0	566.7	641.3	285	306	305	163,041	173,564	195,513
Total, fall	1,140.4	1,047.3	1,140.4	253	264	266	288,674	276,055	302,818
United States	1,390.8	1,261.8	1,374.1	246	253	257	342,060	319,834	353,386

¹ Preliminary.

Crop Production, annual summary, SRS.

Table 13—Sweetpotatoes: Acreage, yield per acre, and production, 1974, 1975, and 1976

Group and State	Harvested acreage			Yield per acre			Production		
	1974	1975	1976 ¹	1974	1975	1976 ¹	1974	1975	1976 ¹
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>
Central Atlantic ²	11.3	10.6	10.6	134	143	138	1,509	1,521	1,462
Lower Atlantic ³	39.5	40.8	43.0	124	133	129	4,903	5,445	5,533
Central ⁴	64.2	59.8	57.4	100	93	96	6,403	5,579	5,530
California	6.7	7.3	7.6	165	140	155	1,106	1,022	1,178
United States	121.7	118.5	118.6	114	114	116	13,921	13,567	13,703

¹ Preliminary. ² New Jersey, Maryland, and Virginia. ³ North Carolina, South Carolina, and Georgia. ⁴ Tennessee, Alabama, Mississippi, Arkansas, Louisiana, and Texas.

Crop Production, annual summary, SRS, USDA.

Table 14—Potatoes: Prices f.o.b. shipping points per hundredweight, U.S. No. 1 grade or better, indicated periods, 1975, 1976, and 1977

Shipping point and variety	1975-76			1976-77		
	November 15	December 13	January 10	November 13	December 11	January 10
	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Maine						
Round whites	---	---	---	---	---	---
Long Island, New York						
Round whites	5.80	5.66	6.72	4.50	4.50	6.26
New York, Upstate						
Round whites	6.26	6.32	7.06	5.00	5.02	6.32
Michigan						
Round whites	5.88	5.46	5.54	---	3.82	4.84
Wisconsin						
Round whites	---	4.88	---	---	3.38	---
Washington						
Russets	6.71	6.63	4.85	4.54	4.59	4.38
Colorado						
Reds	6.13	5.63	5.50	4.25	4.13	4.13
Idaho						
Russets 2" or 4 oz. min. ..	6.90	5.88	6.48	5.00	5.00	5.40

F.O.B. prices are simple averages of the range of daily prices for the week ended on indicated date.

Compiled from Market News Service reports.

Table 15—Canned vegetables: commercial pack and canners' seasonal supply, shipments to January 1, stocks January 1, seasonal shipments, selected commodities

Commodity and season	Carryover	Pack	Seasonal supply	Shipments to January 1	Stocks January 1	Total seasonal shipments
	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>	<i>Mil. cases 24/303's</i>
Beans, lima						
1973-74 .....	.1	3.2	3.3	1.6	1.7	3.1
1974-75 .....	.2	2.5	2.7	1.5	1.3	2.5
1975-76 .....	.2	3.7	3.9	1.5	2.5	2.9
1976-77	1.0	2.8	3.8	1.3	2.4	N.A.
Beans, snap						
1973-74	2.7	55.0	57.7	31.2	26.5	52.5
1974-75	5.2	62.3	67.5	33.2	34.3	52.2
1975-76	15.3	55.4	70.7	31.0	39.8	57.1
1976-77	13.6	47.4	61.0	30.4	30.5	N.A.
Corn, sweet						
1973-74	6.3	55.2	61.5	28.7	32.8	57.6
1974-75	3.9	46.4	50.3	26.7	23.6	45.2
1975-76	5.1	57.5	62.6	26.5	36.1	52.9
1976-77	9.7	54.7	64.4	25.6	38.8	N.A.
Peas, green						
1973-74	3.6	29.6	33.2	21.3	11.9	31.7
1974-75	1.5	33.1	34.6	19.9	14.7	30.1
1975-76	4.5	35.2	39.7	19.0	20.7	31.3
1976-77	8.4	31.9	40.3	18.6	21.7	N.A.

¹ Does not include late fall pack in Florida and Texas.

² January 1 thru November 1.

N.A.—Not available.

National Canners Association.

Table 16—Sweetpotatoes: Prices f.o.b. shipping points and wholesale price at New York and Chicago, indicated periods, 1975, 1976, and 1977

Item	State	Week ended					
		1975-76			197-77		
		Nov. 15	Dec. 13	Jan. 10	Nov. 20	Dec. 11	Jan. 15
		<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
F.O.B. shipping points, Porto Rico, cured (U.S. No. 1 50 lb. crt.)	S.W. Louisiana Eastern N. Carolina	---	7.63	7.40	6.58	6.58	6.63
Porto Rico, cured (crt., ctn., and bu. bkt.)		- -	---	6.63	5.75	5.63	5.75
		Tuesday nearest mid-month					
		1974-75			1975-76		
		Nov. 11	Dec. 9	Jan. 13	Nov. 16	Dec. 14	Jan. 10
		<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Terminal markets							
New York							
Porto Rico cured (50 lb. ctn.)	N. Carolina	---	7.75	7.50	6.00	6.75	6.75
Chicago							
Porto Rico cured (50 lb. crt.)	Louisiana	- -	8.75	9.00	7.75	8.25	8.37

F.o.b. prices are simple averages of the range of daily prices, compiled from Market News Service reports. The market prices are representative prices for Tuesday of each week and are submitted by the Market News Service representative at each market.

Table 17—United States average prices received by farmers per hundredweight for important field crops, indicated periods, 1975, 1976, and 1977

Commodity	1975	1976				1977
	Dec. 15	Jan. 15	Oct. 15	Nov. 15	Dec. 15	Jan. 15
	<i>Dols.</i>	<i>Dols.</i>	<i>Dols.</i>	<i>Dols.</i>	<i>Dols.</i>	<i>Dols.</i>
Potatoes	3.92	4.61	2.98	3.10	3.06	3.40
Sweetpotatoes	9.82	9.70	6.31	6.82	7.36	8.02
Beans, dry edible	20.50	20.00	14.30	15.30	14.50	14.10
Peas, dry	6.45	6.07	11.40	10.60	10.20	11.10

Agricultural Prices, SRS, USDA, issued monthly.

Table 18—Beans, dry edible: Acreage, yield per acre, and production, 1974, 1975, and 1976¹

States and Classes	Harvested acreage			Yield per acre			Production ²		
	1974	1975	1976	1974	1975	1976	1974	1975	1976
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 cwt.	1,000 cwt.	1,000 cwt.
Michigan	575	520	525	1,200	900	930	6,902	4,680	4,883
New York	42	47	40	1,230	1,130	1,070	517	531	428
Northwest ³	483	506	520	1,467	1,464	1,372	7,087	7,410	7,134
Southwest ⁴	204	228	210	836	884	888	1,706	2,015	1,866
California									
Large lima	33	24	35	2,030	1,700	1,491	670	408	522
Baby lima	28	20	21	2,050	2,080	1,800	574	416	378
Other	166	110	123	1,655	1,610	1,545	2,747	1,782	1,900
Total California	227	154	179	1,758	1,692	1,564	3,991	2,606	2,800
Other States	10.7	12.1	7.8	1,308	1,488	1,346	140	180	105
United States	1,541.7	1,467.1	1,485.3	1,320	1,188	1,159	20,343	17,422	17,216

¹ Includes beans grown for seed. ² Cleaned basis. ³ Nebraska, Montana, Idaho, Wyoming, Washington, Minnesota, and North Dakota. ⁴ Kansas, Colorado, New Mexico, and Utah.

N.A. not available.

Crop Production, annual summary, SRS, USDA.

Table 19—Beans, dry edible: Production in selected States, by major types, United States, 1976 and total by types 1975

Type	Michigan	Idaho	Wyoming	Nebraska	Washington	Colorado	New York	California	Other ¹	Total	
										1976	1975
	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.	1,000 cwt.
Peas, navy	4,134	---	---	---	---	---	---	---	181	4,315	4,083
Great northern	---	420	64	1,275	---	---	---	---	12	1,771	1,413
Pinto	90	1,177	420	665	150	1,652	---	---	1,562	5,716	6,391
Red kidney	306	49	---	---	---	---	300	671	107	1,433	1,484
Small red	---	240	---	---	197	---	---	---	---	437	494
Large lima	---	---	---	---	---	---	---	522	---	522	408
Baby lima	---	---	---	---	---	---	---	378	---	378	416
Small white ²	---	---	---	---	55	---	---	280	---	335	239
Blackeye	---	---	---	---	---	---	---	607	---	607	499
Other	353	769	---	40	53	13	128	342	4	1,702	1,995
U.S. total	4,883	2,655	484	1,980	455	1,665	428	2,800	1,866	17,216	17,422

¹ Includes Kansas, Minnesota, Montana, New Mexico, North Dakota, and Utah. ² Includes flat small white.

Crop Production, annual summary, SRS, USDA.

Table 20—Peas, dry field: Acreage, yield per acre, and production 1974, 1975, and 1976¹

State	Harvested acreage			Yield per acre			Production		
	1974	1975	1976	1974	1975	1976	1974	1975	1976
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 cwt.	1,000 cwt.	1,000 cwt.
Minnesota	1.0	---	---	1,300	---	---	13	---	---
North Dakota	(²)	(²)	(²)	(²)	(²)	(²)	(²)	(²)	(²)
Idaho	89.0	69.0	48.0	1,500	1,390	1,720	1,335	959	826
Washington	117.0	117.0	77.0	1,530	1,485	1,720	1,790	1,737	1,324
Oregon	6.0	2.5	---	1,500	1,400	---	90	35	---
United States	213.0	188.5	125.0	1,515	1,449	1,720	3,228	2,731	2,150

¹ Includes peas grown for seed and cannery peas harvested dry. ² Estimates discontinued.

Crop Production, annual summary, SRS, USDA.

PRICES, MARGINS, AND FARM VALUE OF CANNED AND FROZEN SWEET PEAS

by
Alfred J. Burns
Agricultural Economist
Commodity Economics Division
Economic Research Service

ABSTRACT: Green peas make up about one-eighth of the U.S. canned and frozen vegetable pack (not including potato products). This article discusses prices, marketing margins, and farm value for canned and frozen sweet peas sold in selected cities in 1965/66-1975/76.

KEYWORDS: Prices, margins, farm value, sweet peas, canned, and frozen.

While not the No. 1 processing vegetable, green peas comprise about 11 percent of the canned vegetable pack and 16-18 percent of the frozen pack.

This article discusses prices, marketing margins, and farm value for canned and frozen sweet peas. Data used are from a continuing study of costs and margins for fruits and vegetables conducted by the Economic Research Service (ERS).

Canned and frozen sweet peas were priced at three levels—farm or delivered in (delivered to the processing plant), processor (f.o.b. processing plant), and retail. The quarterly retail prices used were collected by the Bureau of Labor Statistics (BLS) in a sample of retail stores on the first consecutive Tuesday, Wednesday, and Thursday of every third month. The processor price for canned sweet peas was obtained from The Canning Trade, Inc.'s *Food Production/Management* magazine. For frozen sweet peas, the processor price was obtained from the American Institute of Food Distribution's *Report on Food Markets* for the first week of the month in which retail prices were collected. Farm value is a computed return for the quantity of vegetables required to process a case of 24 cans of canned sweet peas or 24 packages of frozen sweet peas—based on a seasonal average per-ton-price paid by processors. Average prices paid by processors are reported by the Statistical Reporting Service (SRS). The retail value is simply the retail price (no allowance is made for losses during marketing). Simple averages are made of

quarterly retail prices, processor prices, and farm values to obtain seasonal average prices.

The wholesale and retail margin is the difference between the retail value and the processor price. This margin includes payment for transportation from the processor to the consuming city, wholesaling or brokerage, intra-city transportation, and retailing. The processor margin is the difference between the processor price and the farm value. It is the amount paid for processing, warehousing, and selling the product.

Canned Peas

Canned green peas are one of only a few processed vegetables whose per capita consumption declined since the early 1960's. Consumption dropped from 7.67 pounds (fresh weight) per person in 1960-62 to 6.77 pounds in 1973-75.

In recent years, about 80 percent of the U.S. canned green pea pack were processed in the Midwest, with the West accounting for 14 percent of the U.S. pack, and the East 6 percent.

The season's supply of canned green peas fluctuated between 33 and 43 million cases (24 No. 303 cans) between 1965/66 and 1975/76 (table 1). The season's supply dropped to a low of 33 million cases in 1973/74, followed by only 35 million cases in 1974/75. Carryover of canned green peas fell to a low of 1½ million cases in 1974 and rose to a high of 8½ million cases in 1976.

Table 1—Peas, green, canned and frozen: June 1 carryover, commercial pack, and season's supply

Season	Canned			Frozen		
	June 1 carryover	Pack	Season's supply	June 1 carryover	Pack	Season's supply
	Million cases 24/303's	Million cases 24/303's	Million cases 24/303's	Million pounds	Million pounds	Million pounds
1965/66	3.0	37.6	40.6	97.5	443.3	540.8
1966/67	5.7	31.9	37.6	113.5	375.4	488.9
1967/68	3.9	37.7	41.6	100.5	424.2	524.7
1968/69	6.6	36.2	42.8	124.3	429.4	553.7
1969/70	8.3	32.1	40.4	147.0	367.3	514.3
1970/71	6.3	28.7	35.0	136.7	344.5	481.2
1971/72	4.3	33.2	37.5	110.1	348.4	458.5
1972/73	4.9	33.1	38.0	87.3	340.1	427.4
1973/74	3.6	29.6	33.2	61.4	387.7	449.1
1974/75	1.5	33.1	34.6	64.9	416.7	481.6
1975/76	4.5	35.2	39.7	114.5	400.6	515.1
1976/77 ¹	8.4	31.9	40.3	132.3	328.7	461.0

Frozen Peas

Per capita consumption of frozen peas has fluctuated from a low of 4.50 pounds (fresh weight) to a high of 5.66 pounds since 1960, but did not establish any trend over the period. Consumption averaged 4.79 pounds-per-person in 1960-62 and 4.73 in 1973-75.

About 70 percent of the U.S. frozen green pea pack is processed in the Northwest. The Midwest accounts for 12-15 percent of the U.S. pack, California 6-8 percent, and the East and South 10 percent.

Findings

Changes in prices, margins, and farm value were similar for both canned and frozen sweet peas over the study period (tables 2-3 and figures 1-2). For the 11 seasons, the retail value of canned sweet peas in Chicago and Detroit increased an average of 27 cents per case (24/303's) per season. During this period, farm value increased 7 cents per case per season; the processor margin rose 20 cents; and the wholesale and retail margin did not change.

The retail value of frozen sweet peas in Seattle and Washington, D.C. increased an average of 35 cents per case (24/10-ounce packages) per season since 1965/66. During this period, the processor margin increased an average of 14 cents per case per season; the wholesale and retail margin rose 13 cents; and farm value went up 8 cents.

The market shares or percentage of the retail value received by growers and other market factors did not change significantly in the period for frozen sweet peas. For canned sweet peas, the wholesale and retail margin's share fell an average of about 1-1/3 percentage points per season; the processor's margin rose about 1 percentage point per season; and farm value's share rose 1/3 of a per-

centage point. For the 11 seasons, the wholesale and retail margin for frozen sweet peas averaged 44 percent of the retail value; the processor margin 39 percent; and farm value 17 percent. The wholesale and retail margin for canned sweet peas averaged 36 percent of the retail value, the processor margin, 47 percent, and the farm value, 17 percent.

Retail price, farm value, and the processor margin increased sharply for both canned and frozen sweet peas in 1974/75, after only moderate changes with a slow upward trend in the preceding nine seasons. Farm value and retail price continued to increase in 1975/76, but the processor margin remained stable for canned sweet peas and declined for frozen green peas that season.

Several factors contributed to changes in prices, margins, and farm value of processed sweet peas in 1974/75 and 1975/76. Processed vegetable prices increased less than fresh vegetable prices in most of 1973. Continued relatively high meat prices and the need to stretch family food budgets favored heavy use of processed vegetables. The relatively attractive prices helped stimulate rapid movement of processed vegetables in late 1973 and 1974 and resulted in an extremely low carryover for most processed vegetables in 1974.

The low 1974 carryover resulted in increased processor demand for processing vegetable supplies. To obtain larger supplies, sharply higher contract prices were paid to growers, reflecting higher fuel, seed, fertilizer, and other production costs.

In addition to higher raw product costs, the 1974 pack was subjected to an accumulation of markedly higher processing costs—especially for labor, tinplate, paper, energy, sugar, and transportation.

The lifting of price controls in early 1974 did not exert much influence on the processor price level of

Table 2—Peas, sweet, canned: Season average prices, margins, and farm value, average Chicago and Detroit¹

Season	Retail price per no. 303 can ²	Retail value per case ²	Wholesale and retail margin ³		Processor margin ⁴		Farm value ⁵	
			Per case	Percentage of retail value	Per case	Percentage of retail value	Per case	Percentage of retail value
	Cents	Dollars	Dollars	Percent	Dollars	Percent	Dollars	Percent
1965/66	24.0	5.76	2.60	45	2.31	40	.85	15
1966/67	24.4	5.86	2.47	42	2.45	42	.94	16
1967/68	24.0	5.76	2.20	38	2.59	45	.97	17
1968/69	23.3	5.59	2.07	37	2.60	47	.92	16
1969/70	23.8	5.71	2.01	35	2.76	48	.94	17
1970/71	25.0	6.00	2.18	36	2.85	48	.97	16
1971/72	25.1	6.02	2.05	34	3.01	50	.96	16
1972/73	24.7	5.92	1.91	32	3.03	51	.98	17
1973/74	27.2	6.53	2.11	32	3.40	52	1.02	16
1974/75	35.1	8.42	2.48	30	4.39	52	1.55	18
1975/76	37.4	8.98	2.70	30	4.41	49	1.87	21

¹ Marketing Season: June-May. ² Fancy grade, mixed-sieve size. ³ Includes transportation from processing plants to Chicago and Detroit. ⁴ Midwestern processors. ⁵ Average returns for

17.39 pounds (farm weight, shelled basis) of sweet peas for processing received by growers in the Midwest (Minnesota and Wisconsin).

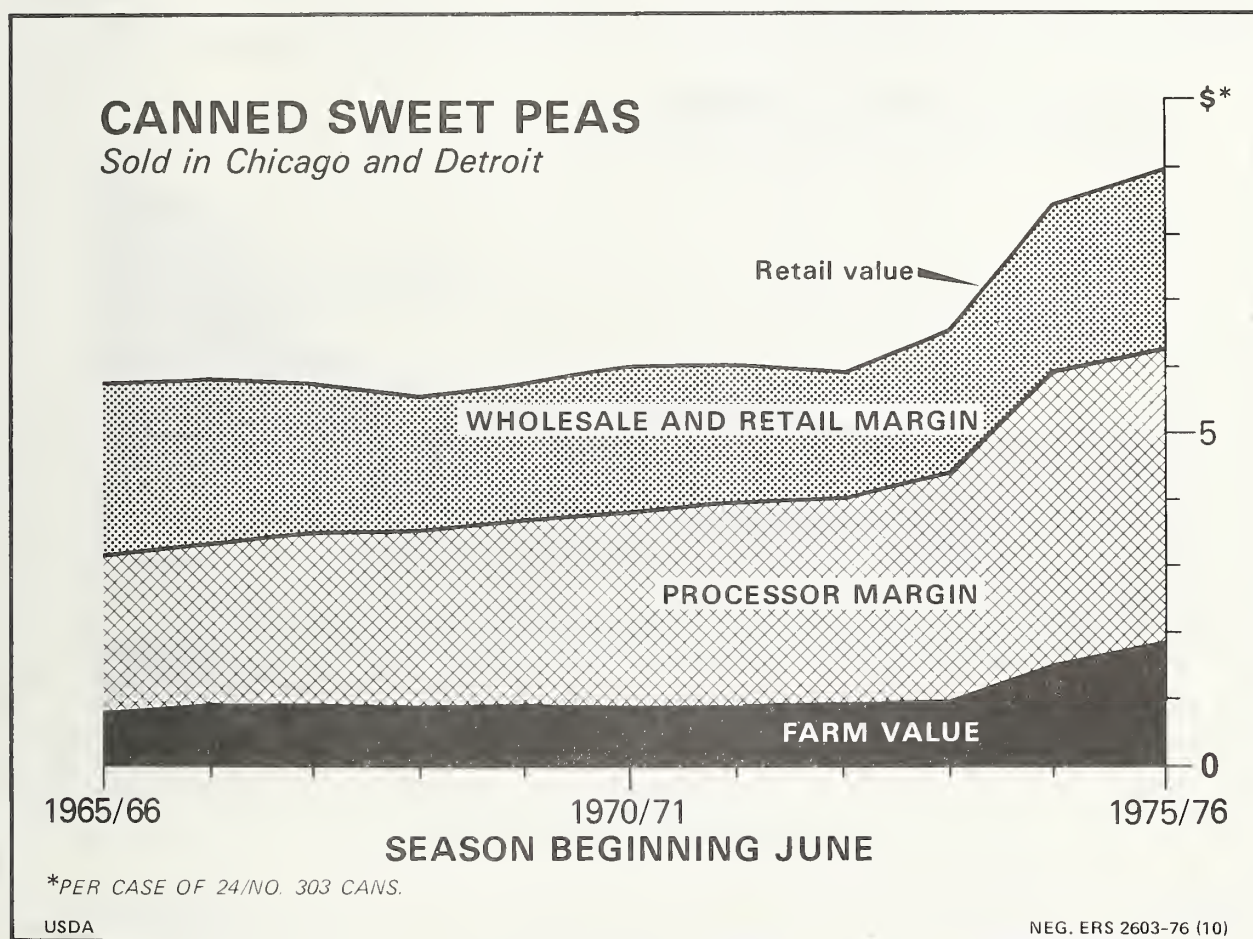


Figure 1

Table 3—Peas, sweet, frozen: Season average prices, margins, and farm value, average Seattle and Washington, D.C.¹

Season	Retail price per 10-oz. pkg. ²	Retail value per case ²	Wholesale and retail margin ³		Processor margin ⁴		Farm value ⁵	
			Per case	Percentage of retail value	Per case	Percentage of retail value	Per case	Percentage of retail value
	Cents	Dollars	Dollars	Percent	Dollars	Percent	Dollars	Percent
1965/66	19.8	4.75	2.44	51	1.50	32	.81	17
1966/67	19.6	4.70	1.98	42	1.91	41	.81	17
1967/68	20.1	4.82	2.12	44	1.87	39	.83	17
1968/69	20.5	4.92	2.27	46	1.84	37	.81	17
1969/70	21.2	5.09	2.33	46	1.94	38	.82	16
1970/71	22.0	5.28	2.28	43	2.15	41	.85	16
1971/72	22.4	5.38	2.28	42	2.28	42	.82	16
1972/73	22.8	5.47	2.22	41	2.38	43	.87	16
1973/74	24.9	5.98	2.57	43	2.43	41	.98	16
1974/75	33.2	7.97	3.09	39	3.25	41	1.63	20
1975/76	36.6	8.78	4.16	47	2.86	33	1.76	20

¹ Marketing Season: June-May. ² Fancy grade. ³ Includes transportation from processing plants to Seattle and Washington, D.C. ⁴ Western processors. ⁵ Average for 16.35 pounds (farm

weight, shelled basis) of sweet peas for processing received by growers in the West (Idaho, Oregon and Washington).

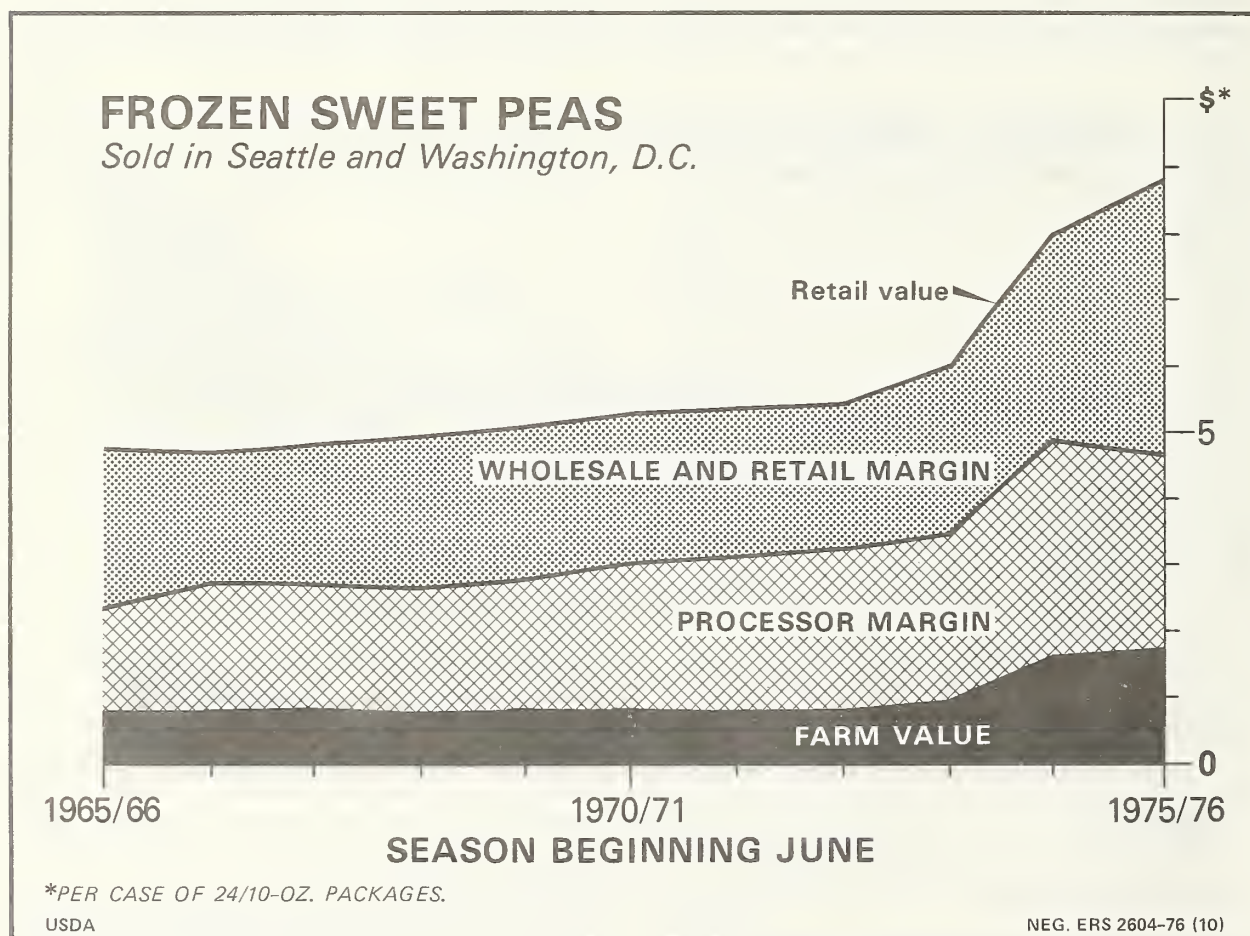


Figure 2

1973 pack vegetables. However, the increase in raw product costs plus higher processing costs in 1974 resulted in higher processor prices in most of 1974/75. Added wholesale and retail margins resulted in sharply higher retail prices for all processed vegetables that season.

Higher retail prices in 1974/75 dulled the competitive edge processed vegetables had the previous season. Also, increased popularity of home gardens and more home processing of vegetables in 1975 contributed to a downward shift in consumer demand for commercially processed vegetables in 1975/76. Anticipating continued good movement, processors held heavy supplies of most items in the fall 1975. Higher 1975/76 opening processor prices, resulting from higher processing costs and higher raw product costs, were met by a slowdown in movement of most processed vegetables.

Processors were thus forced to reduce list prices several times on most items to stimulate heavier movement. Reduced processor prices resulted in retail prices for many processed vegetables being lower in 1975/76 than a year earlier. However, retail prices of canned and frozen sweet peas did not decline.

The reduced processor price for frozen peas in 1975/76 was more than offset by a larger whole-

sale and retail margin, which resulted in retail prices being higher in 1975/76 than in 1974/75.

Continued strong demand for canned sweet peas in 1975/76 allowed processors to maintain selling prices and in some cases increase prices to pass on increased raw product costs. This, together with a larger wholesale and retail margin, resulted in retail prices for canned peas being higher in 1975/76 than a year earlier.

In the current season, an extremely large carry-over of canned peas was offset by a sharp drop in the pack, resulting in an 11-percent drop in total supplies. However, a 9-percent reduction in the 1976 frozen pea pack did not fully offset the large carryover and resulted in frozen pea supplies being slightly larger this season than in 1975/76.

The 1976 raw product prices of green peas for canning and freezing were lower than in 1975, partially offsetting increased processing costs. Processor selling prices and retail prices of canned and frozen peas in the early months of the 1976/77 season were about the same as in the closing months of 1975/76. Both prices increased slightly in recent months and are expected to remain at or near present levels for the remainder of the current season. Processor and retail prices for 1976/77 are expected to average slightly lower than in 1975/76.

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